



Indigenous Businesses in the BC Interior: Case Studies in Marketing

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Case Studies in Marketing

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Contents

Part I. Gift 'n Gab Trading Post Case Study

1. Introduction	3
2. Teachers Resources	5
3. Overview and History of the Business	11
4. Marketing Approaches	23
5. Resources and Credits	29
<i>Resources</i>	29
<i>Credits</i>	29

Part II. Moccasin Trails Case Study

6. Introduction	33
7. Teachers Resources	35
8. Overview and History of the Business	40
9. The Experiences	42
10. Physical Products	46
11. Cultural Sensitivity	47
12. Customers	49
13. Competition	51
14. Pricing	52
15. Promotion	54
16. Looking Ahead	60

17. Resources and Credits	63
<i>Resources</i>	63
<i>References</i>	63
<i>Credits</i>	63

Part III. Quaaout Lodge Case Study

18. Introduction	67
19. Teachers Resources	69
20. Overview of the Business	74
21. Products and Service Offerings	77
22. Indigenous Community Involvement	80
23. Customers	84
24. Pricing	87
25. Competitors	89
26. Promotion	90
27. Looking Ahead	95
28. Resources and Credits	98

Part IV. Spapium Little Prairie Farm Case Study

29. Introduction	103
30. Teachers Resources	105
31. Overview of the Business	110
32. Products	113
33. Customers	121
34. Competitors	123
35. Finances	124
36. Marketing Approaches	125

37. Resources and Credits	134
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Part V. Be Inspired! Events and Event Planning (BIE) Case Study

38. Introduction	137
39. Teachers Resources	138
40. Overview of the Business	144
41. Event Planning Services	148
42. Cultural Components	153
43. Customers	154
44. Competitors	156
45. Pricing	157
46. Marketing Approaches	159
47. Resources and Credits	171

Part VI. Spirit of the Lake Native Boutique Case Study

48. Introduction	175
49. Teachers Resource	176
50. Overview of the Business	181
51. Product Details	188
52. Competitors	196
53. Pricing	198
54. Customers	200
55. Finances	202
56. Marketing Approaches	203
57. Resources and Credits	214

PART I

GIFT 'N GAB TRADING POST CASE STUDY

1. Introduction

This case study explores marketing issues in a unique retail setting. Not only does it include aspects of destination and tourism marketing, it also addresses challenges of Indigenous business ownership and an Indigenous product focus.

As a significant and important niche business in British Columbia and across Canada, Indigenous business ownership is growing and flourishing. The following case outlines the current situation for Gift 'N Gab (GNG) Trading Post, setting the scene for students to assess marketing opportunities, justify marketing recommendations, and rationalize strategic marketing approaches.



Fig 1: Sign outside the store (CC BY-NC-ND 4.0)

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2. Teachers Resources



Fig 2: Entrance to Gift n' Gab Trading Post in Barriere, BC (CC BY-NC-ND 4.0)

Course Fit

The case analysis encourages students to conduct research into topics such as Indigenous businesses, unique marketing challenges, approaches to create brand identities, product selection, and the intricacies of tourism marketing. Students will suggest marketing strategies that can overcome these challenges and make GNG flourish into the future. By analyzing this case, students will be exposed to the following marketing topics:

- Marketing Strategy
- Marketing Research

- Competitive Advantage
- Brand Identity
- Brand Loyalty
- Indigenous Business
- Tourism Marketing
- Destination Marketing
- Retailing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communications

The analysis opportunities given through this case fit any advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic marketing courses as well as specific marketing topics such as marketing strategy, marketing research, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have covered. Below are some suggestions on the topics that can be covered through an analysis of this case.

Consumer Behaviour:

- Apply decision-making concepts and steps to this case
- Apply attitude models to this situation and target

audience

- Apply concepts of cultural values and reference groups to this case
- Identify suitable subcultures to be targeted
- Identify cultural influences on the behaviour of GNG's customers

E-Commerce:

- Investigate the benefits of spending time and money to start e-commerce operations
- Research the objectives for an improved website
- Research opportunities to tie into other e-commerce operations
- Assess how e-commerce operations would fit with the Indigenous focus of the store
- Identify competitors in a potential e-commerce setting

Advertising:

- Determine appropriate information to be included on highway signage
- Identify suitable print publications for advertising
- Evaluate research on the effectiveness of radio advertising for local businesses
- Design an advertising plan and budget for social media ads
- Investigate additional directories that could be beneficial for GNG

Tourism Marketing:

- Suggest additional services that could appeal to tourists
- Identify triggers for travelers to visit roadside attractions
- Determine appropriate channels for marketing this tourist attraction
- Research the success of other tourism attractions with an Indigenous focus in BC
- Investigate current trends in tourism marketing



Fig 3: Gift n' Gab Trading Post sign in Barriere, BC

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Using the website to sell higher priced items, providing

- customers, the opportunity to research before a visit
- Including references to the salmon products on the highway signage and in ads
- Pursuing a connection with the Rocky Mountaineer business that brings many tourists to Kamloops (e.g., as a day trip)
- Connecting with Sun Peaks to tie to the resort business in the summer and winter
- Establishing ties with other tourism attractions in the area
- Collecting contact information such as email, for example by using a guest book
- Tailoring the suggestions to the typical age of the customer (e.g., for social media ideas and for product recommendations)

Sample Instructions for Students

Considering the information given in this case study, your task is to apply marketing concepts to recommend a marketing strategy and approach for the Gift 'n Gab Trading post.

Please note that the goal is not to find out what was actually done but to research options, explain your decisions and elaborate on your chosen marketing approach. The emphasis is on justifying your choices by utilizing your knowledge of marketing theories and concepts, as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 5,000 per year

Components: Marketing channels, messages, timing/schedule, brand personality, target audience

The goal is to increase exposure for GNG by applying marketing concepts in various areas (e.g., consumer behaviour), keeping in mind the limited human resources

available. Students should also focus on suggestions that create brand loyalty and form long term relationships for GNC.

All recommendations should be based on a detailed analysis of the target audience, including creating a persona. Key performance metrics should be recommended and justified. Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors, and justify any product strategy modifications. Recommendations should integrate multiple marketing channels with a combination of mass communications—such as advertising, promotions, or events—as well as personal communications—such as direct marketing, word of mouth, or personal selling.

3. Overview and History of the Business

GNG is located in Barriere, BC, and it is owned by Kathie Heard, a carrier of the Wet'suwet'en Nation in Smithers, BC. After many years living in Edmonton, Alberta, Kathie and her husband relocated to Barriere, in July of 2015, on a whim and based on a somewhat random alignment of decisions, taking a courageous plunge into business ownership in BC.

With a background in finance and accounting, Kathie was not ready to retire and instead followed her dream of operating her own business: either a deli/café or a gift shop. Kathie and her husband had noticed that there were no other gift shops of the kind they imagined between Alberta and the West Coast, while there are plenty of shops in Vancouver. After finding a suitable property during their travels in Barriere, consisting of a log building with residence included, the GNG gift shop was born. A gift shop avoided the health regulations affecting a food establishment and enabled Kathie to offer a very unique selection of primarily First Nations gifts and items made in Canada. The move to BC and the running of the business also connected Kathie and her family back to her origins and roots. Kathie is open to share her First Nations heritage and knowledge with anyone who is interested.



Fig 4: Kathie Heard, owner of Gift n' Gab (CC BY-NC-ND 4.0)

Her husband John up with the name “Gift ‘n Gab”, while the addition of “Trading Post” seemed to clarify for customers the type of store; “Trading Post” has also turned into the short name for the shop. First Nations artist Clifton Fred assisted in creating the GNG logo: Feathers represent the “Gab” in the name and the encouragement to stop in and connect, while the traditional BC Indigenous colours—black, red, and white—are represented in the logo.



Fig 5: Gift n' Gab Trading Post — inside the store (CC BY-NC-ND 4.0)

“The eagle feather plays a substantial part in religious and shamanic practices and ceremonies. The eagle feather transmits strength; it gives the ability to speak honestly from the heart, without hurt or anger. The middle vane in the feather symbolizes the path that every man walks in their life time, and every barb that comes of the middle vane symbolizes the choices we all have in life, and that every choice we make is

attached to the middle or main path that we take. Eagle feathers are used while smudging along with praying. The feathers were also given as symbolic gift to impart respect for accomplishment and display of courage and wisdom.”

GNG is 100% aboriginally owned and operated; Kathie is the sole owner and full-time operator of the shop. Her daughters and her husband help out at the store. Currently the store is open every day from 9:00 am to 6:00 pm during the summer and is wheelchair accessible.

What sets the business apart besides the unique products is Kathie’s desire to meet people; there is no sales pressure, and even visitors who are curious just to stop and check out the store are warmly welcomed.

Listen to Audio Clip 1 – Introduction to Gift ‘N Gab
[\(Transcript Available\)](#) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=213>

“We offer good old-fashioned friendly customer service. We spend a lot of time visiting with the customers, some of whom don’t even purchase anything and that’s okay. We are interested in exchanging stories about our journeys and hearing the same from those who want to share.”

Products Details

GNG exclusively carries First Nations products from BC or Canada, setting itself apart from other shops in Jasper or Vancouver. From the offerings of companies such as Manitoba Mukluks, a company that offers both Canadian-made and internationally made products, GNG will only carry the Canada-made ones. Very few exceptions to this rule are made for items not manufactured in Canada, such as mugs or select apparel. In those cases, Kathie makes sure that the designs originate from First Nations, even if the products are created overseas.

Kathie openly shares her First Nations heritage with her customers by offering Indigenous products of all kinds. The only exception to sharing First Nations products and customs with anyone interested are ceremonial blankets or carvings, which are reserved for First Nations ceremonies.

Other products include wood art, crystal, smudging supplies, herbs, candles, cards, apparel, jewelry, candied salmon, salmon jerky, and coffee. Kathie also owns an industrial-sized embroidery machine to customize apparel on her own, such as adding the coyote, a spirit animal, to select items. As much as possible, Kathie provides tourism information when travelers ask her questions, although the official tourist/visitor information booth is located in downtown Barriere, off the highway.

One of the most popular product categories is salmon, especially wild BC/local salmon. Kathie maintains a business relationship with Riverfresh Wild BC Salmon in Kamloops and really promotes salmon sales. This product entices a lot of people to stop, and even turn around, to come into the store.



Fig 6: Salmon display at Gift 'n Gab Trading Post (CC BY-NC-ND 4.0)

“Salmon is a huge draw!”

Due to questions from the customers, offering food might be a consideration for the future for GNG, possibly allowing a food truck to set up in front of the shop. It would encourage travelers to stop, particularly if special food is served, such as Kathie's idea of salmon and bannock burgers, as well as ice cream. The challenges here are additional staff requirements and meeting food preparation regulations.

Kathie travels to gift shows in Vancouver and Edmonton two or three times a year, where she looks exclusively for items made in Canada and First Nations designs. She also has personal relationships with many suppliers of unique crafts and products. Kathie supports local artists and also connected with the local Secwepemc Nation representatives to show her respect—as a visitor to the territory—by letting them know about her business and to encourage local artisans to offer their products in her store. In addition, random encounters on road trips have also resulted in relationships with artists, such as a chain saw carver that made the bears and wolves displayed outside the store. In addition, artists sometimes stop at her store and introduce their products, such as the late Brian Grandbois's (Cold Lake First Nations, Alberta) art cards.

“I try to have as much local stuff as I can. But because we’re so close to the coast, a lot of the stuff is going to come from the coast.”

The products are sold exclusively in the retail store, not online or at events. On rare occasions Kathie has delivered purchases to customers when it matched her travel schedule.

GNG plans to update the product selection on a regular basis. Kathie also found out by trial and error what sells and what doesn't sell (e.g., specific designs), originally selecting inventory that suited her own taste and learning through the years to accommodate the customers' tastes. Overall, GNG's product selection is based on the store's audience as outlined below,

for example offering products for a more advanced age group instead of carrying “hot sellers” for younger, urban customers.

Examples of artists whose products the store carries:

- Chilliwack artist Michael Forbes
- Renowned artist Wade Baker
- Carvings from Richard Baker
- Art by Richard’s son Troy and brother Matthew (represented at the Vancouver airport)

Listen to Audio Clip 2 – Consumer Behaviour ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Listen to Audio Clip 3 – Tourism and Marketing ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Pricing

Compared to competitors’ offerings, GNG maintains price

levels that are at the lower end of the range for these type of products in gift stores.

“All of the feedback that I get on the products that we carry, is that our stuff is very, very fairly priced. And that makes me happy, because that was one of my goals.”

The most popular and fastest-selling price range is 20-40 CAD. Products with prices higher than that take longer to sell, often remaining on the shelf for over a year, as customers would have to be specifically looking for those items.

Kathie has considered marketing guidelines with regards to what percentage of the shop space should contain products in a particular price range but realized that by trying different products and prices, she would eventually in the end find the best combination.

“It’s all trial and error.”

No discounts have been applied to the products, given the competitive pricing strategy. In the past, rack cards that were distributed contained discounts but the interest seemed low.

Customers

As a general rule, Kathie's customers are 35 years and older. They tend to be very educated in the specifics of the products they enjoy (for example, asking for very specific smudging ingredients). They are aware of typical West Coast aboriginal designs and ask questions of the origins. For example, Kathie works with an artist in Edmonton whose ancestry is Apache so the designs reflect this and the customers' questions show the awareness. Typically, her customers are looking for BC designs

and products, which are very different from designs from other regions.

In general, a lot of Europeans and travellers from neighbouring provinces frequent the store. Some tour buses have stopped in the past. The teepees in particular attract a lot of First Nations customers, many from Alberta and Saskatchewan as well as some from Northern BC. Kathie also works with B&Bs that recommend the store to their customers, who are often interested in the salmon products.

Typically, travelers who passed the store in the past tend to stop in on subsequent visits to the region. In recent years, highway closures due to fires also “forced” a lot of travellers onto the highway through Barriere, which introduced them to the shop. There are also many repeat customers from Kamloops. Kathie exclaims:

“Now they know it’s here!”

Contact information from the customers has not been collected due to the strict privacy laws in Canada. Kathie also mentioned:

“I just don’t want to be that store.”

She wants the customers to leave happy, even if only stories were exchanged. There should be no pressure to buy.



Fig 7: Sign outside the store (CC BY-NC-ND 4.0)



Fig 8: Smudging supplies on display in the Gift n' Gab Trading Post (CC BY-NC-ND 4.0)



Fig 9: Moccasins on display in the Gift n' Gab Trading Post (CC BY-NC-ND 4.0)

Finances

The business was 100% personally financed, including all initial travel to acquire inventory.

4. Marketing Approaches

GNG faces the task to attract visitors who live in the area and/or are passing through the town of Barriere. Located north of Kamloops on the way to Wells Gray Park, the town is easily accessible yet removed from other major highways in British Columbia. For that reason, and in Kathie's own estimate, word of mouth is critically important and valuable. She wants customers to enjoy their visit and have a great personal shopping experience:

“As long as they leave, even empty handed, happy, they will tell others about what a family friendly place the Gift ‘N Gab Trading Post is. Hence, word of mouth will travel.”

Current & Past Approaches

In its first year of operation, GNG purchased radio advertising: It ran on the local radio station, numerous times every day, 365 days a year. During the second year, the radio ads only ran during the summer months, to reach travelers listening to the local station while visiting the area. In addition, that year radio ads were run in Kamloops during the Canada 150 year celebrations. Kathie mentioned that the return on investment for radio ads is difficult to track, without asking every customer whether they heard the radio ad.

Kathie met with a website coach to work on a website, accessible at <http://www.giftngab.ca/>, and get help for the signs along the highway in front of her store. Not a lot of work has

been put into the website, as it can get costly with no guarantee of a return on investment that other channels provide. E-commerce is not an option at this time as the family-run business does not have the human resources nor financial capacity to implement this. Kathie is able to maintain the website on her own and add pictures as needed, but it takes up valuable time, and any redesign would add even more to the time requirements. Some customers have mentioned visiting the website.

GNG has a Facebook page, created by Kathie's daughter, that is used to communicate with existing and potential customers. Kathie's husband has purchased paid advertising on Facebook to promote new products and other information; these ads were targeted by demographic and geographic segmentation. Currently, the Facebook page is also the only option for customers to leave feedback and publish testimonials.



Fig 10: Indigenous designs on water bottles in the Gift n' Gab Trading Post (CC BY-NC-ND 4.0)

The store also works with businesses in the region that refer

travelers to the shop. For example, rack cards have been distributed to B&Bs and the Kamloops, Clearwater, and Barriere tourist information centres. In an attempt to track the effectiveness, rack cards were numbered and signed, keeping track of the origin when they were brought back to the store. Kathie has also ordered custom wrapping paper for the store and puts stickers with her logo on paper shopping bags she supplies to customers.

The store purchased print ads in the North Thompson tourism magazine and the Backroads Map book, targeting different audiences with relatively inexpensive ads for multi-year exposure. GNG is also listed in the directory for Indigenous Tourism BC.

The teepees outside the store were added during the second year to improve the attraction to travelers. Kathie had realized that the highway sign was too low, too small, and had not been improved since the previous building owner. Additional highway signage further down the highway is regulated by provincial laws. So far, efforts to be included in general signage, indicating the approach of a gift shop, have been unsuccessful as the community was planning their own approach to signs along the highway.

Listen to Audio Clip 4 – E-Commerce ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Watch Video Clip – Advertising (CC BY-NC-ND 4.0):



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Marketing Opportunities

GNG wants to grow their business, serving local and tourism markets. To create a competitive advantage in the highly competitive tourism industry is not easy but GNG is motivated to stand out and take on this challenge. Kathie is committed and true to her Indigenous history and the authentic focus of the store. Future efforts to solidify the brand identity have to reflect the Indigenous ownership.

To boost the currently inadequate highway sign directly in front of the store, additional highway signage has been considered, as budget allows. These signs would use keywords to promote the most popular products. Ditch signs are common but typically illegal and can be removed by the province, while billboards on private property require payments to the owner. The opportunities to find a land owner who would allow those signs have improved as more connections have been made in the community. Billboards starting in Kamloops could also prepare drivers traveling north on the highway for the upcoming store.



Fig 11: Gift n' Gab Trading Post sign in Barriere, BC (CC BY-NC-ND 4.0)

“For where I am and the type of business that I have, I need roadside attraction.”

A few tour buses have stopped in the past but tour bus operators have not been approached by GNG. How to access this industry has to be researched as it could be valuable. The store is an appropriate distance from Kamloops for a stop, with few options for interesting stops around and good parking space provided. The store is wheelchair accessible, and Kathie has considered adding picnic tables to the front area, which could be attractive to RVs and wheelchair-bound travelers.

While no other social media platforms besides Facebook have been used so far, Kathie has plans to join TripAdvisor when updated pictures are available that show the improved front area of the store. Kathie would like to learn how to use the TripAdvisor analytics for review of any marketing activities there and take advantage of this huge platform, such as reviews from customers to become a top-rated attraction.

Collecting and publishing reviews or feedback could boost the reputation of the store. Currently Kathie does not actively ask for feedback but has considered mentioning “like us” on the bottom of the store receipt. In addition, other platforms that allow for reviews, such as Google, could be utilized.

To further increase exposure, opportunities such as working with the Rocky Mountaineer or other tourism attractions in the area could be pursued. Kathie is also considering holding events such as dances or story telling experiences. There are also resources that provide marketing support for Indigenous businesses. In addition, plans exist to work with a marketing coach to update the website, work on brochures, and discuss bigger highway signage and frontage attractions.

5. Resources and Credits

Resources

Information included in this case study was collected via email and during a personal interview with GNG's owner, Kathie Heard. All quotes listed in this case study are from the interview with Kathie in Barriere, BC.

Heard, K. (2019, May 28). Personal interview.

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Credits

Kathie Heard, Owner, Gift n' Gab

Kathie's partnership and guidance while creating this case study have been invaluable.

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PART II

MOCCASIN TRAILS CASE STUDY

6. Introduction

On January 27, 2020, one of the two owners of Moccasin Trails was interviewed in Kelowna, BC. Greg Hopf started the interview by sharing his background and upbringing, growing up as part of Yellowknife's Dene First Nation in the Northwest Territories of Canada.

A difficult childhood was strongly influenced by his mother's survival of the Residential School program, resulting in alcohol abuse and distance from the Indigenous culture. In his teenage years, when the beginnings of a dangerous path became apparent, he went to live with his aunt in Fort Simpson. There, in a small community of 900 residents, he was thriving, living a cultural and spiritual life, which defined his identity and provided comfort. Pride in and confidence with his culture grew, providing a moral compass. About his aunt and uncle, Greg says: "I owe everything to them."

Greg's talent as a hockey player saw him play junior and then university hockey, travelling all over the world, before returning to the Northwest Territories in his early 20s. He was put in a leadership position to provide motivation and inspiration for youth and work with kids who were often in a similar position he was in years earlier, trying to guide them onto the right path. With his background in and passion for sports, he created the Aboriginal Sports Circle in the Northwest Territories, building it into a respectable organization that today has programs in every community.

Eventually married and with kids, he realized that he wanted to expose his children to different parts and cultures of Canada, encourage them to take risks, and also go beyond what he and his wife had already achieved in their careers. They moved to Kelowna, BC, and Greg worked for the Thompson-Okanagan Tourism Association (TOTA) as an Indigenous Tourism

specialist. Just like his previous work in sports, he was building relationships and trust with Indigenous communities. Realizing the gap in Indigenous tourism in the region — despite the potential presented by about three million visitors, with one in three visitors looking for an Indigenous experience — Greg started Moccasin Trails with his friend Frank Antoine. Greg and Frank share a vision, philosophy, principles, and moral compass, and they are passionate about educating visitors about Indigenous culture.

Watch Video Clip 1: Interviewee Introduction ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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7. Teachers Resources

Course Fit

The case analysis encourages students to conduct research into topics such as Indigenous businesses, unique marketing challenges, approaches to create brand identities, product selection, and the intricacies of tourism marketing. Students will suggest marketing strategies that can overcome these challenges and make Moccasin Trails flourish into the future. By analyzing this case, students will be exposed to the following marketing topics:

- Marketing Strategy
- Marketing Research
- Competitive Advantage
- Brand Identity
- Brand Loyalty
- Indigenous Business
- Tourism Marketing
- Destination Marketing
- Retailing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communications

The analysis opportunities given through this case fit any advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic marketing courses as well as specific marketing topics such as marketing strategy, marketing research, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have covered. Below are some suggestions.

Consumer Behaviour:

- Apply decision-making concepts and steps to this case
- Apply attitude models to this situation and target audience
- Apply concepts of cultural values and reference groups to this case
- Identify suitable subcultures to be targeted
- Identify cultural influences on the behaviour of Moccasin Trails' customers
- Identify the effect of historic beliefs and presumptions
- Identify trends in corporate bookings of experiences and team building events

E-Commerce:

- Investigate the benefits of spending time and money to improve the website; clearly state specific areas to be modified.
- Research the objectives for an improved website
- Research opportunities to tie into other e-commerce operations
- Assess how e-commerce operations would fit with the indigenous focus of the company; are there special

considerations to be considered?

- What suggestions do you have to increase traffic to the website?
- How can the website be used to grow corporate business?

Advertising:

- Determine appropriate information to be used in guide book advertising, direct marketing or social media advertising
- Identify suitable print publications for advertising besides the guide books mentioned
- Evaluate research on the effectiveness of radio advertising for local businesses
- Design an advertising plan and budget for social media ads
- Investigate additional advertising opportunities for Moccasin Trails

Tourism marketing:

- Suggest additional services and package elements that could appeal to local or international tourists
- Determine additional services to be offered to the company's B2B partners
- Determine a priority list of expenditures and justify by estimating the effect on the business
- Research the success of other Indigenous tour providers in BC and identify competitors
- Research the high end tourism market in BC
- Evaluate benefits and disadvantages to working with tourism associations

- Investigate current trends in tourism marketing

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Using the website to promote brand loyalty, customer engagement, and feedback options
- Growing the list of corporate partners, while keeping the company's objectives and values in mind
- Finding creative solutions to receive additional funding
- Establishing ties with other tourism attractions in the area beyond wineries and golf courses
- Collecting contact information such as email, for example by using a guest book
- Identifying a personal to target the tourism offerings to

Sample Instructions for Students

Considering the information given in this case study, your task is to apply marketing concepts to recommend a marketing strategy and approach for Moccasin Trails. The goal is to research options that are available to Moccasin Trails, to explain suggestions and recommendations, and to justify your chosen marketing approach. Research into trends and lifestyle developments should be integrated. The emphasis is on justifying your choices by utilizing your knowledge of marketing theories and concepts, as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 10,000 per year

Components: Marketing channels, messages, timing/
schedule, brand personality, target audience

The goal is to increase exposure and bookings for Moccasin Trails while also growing the brand. Establishing a reputation for integrity and authenticity is more important for the owners than quick income growth. Your analysis should apply marketing and consumer behaviour concepts, keeping in mind the limited manpower currently available. Students should also focus on suggestions that create brand loyalty and form long-term relationships for Moccasin Trails.

All recommendations should be based on a detailed analysis of the target audience, including creating a persona. Key performance metrics should be recommended and justified.

Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors, research trends and local/national politics, and justify any product strategy modifications. Recommendations should integrate multiple marketing channels with a combination of mass communications — such as advertising, promotions, or events — as well as personal communications — such as direct marketing, word of mouth, personal selling.

8. Overview and History of the Business

Based on Frank's strong connections in Kamloops, Moccasin Trails started there. It was a suitable location to learn the ropes of tourism and learn to be an entrepreneur. After 2 years, the business expanded into Kelowna, where Greg now lives, though Frank still lives in Kamloops. Pilot tours on Lake Okanagan and local trails, working with the Westbank First Nation, were successful and led to Kelowna becoming the company's second, full-product location.

Besides Greg and Frank, Greg's wife is part of the business. While Greg is usually the one in front of the camera, his wife is working behind the scenes and acting as a sounding board. Frank's wife is also involved, and Greg's children often accompany the tours as well. Moccasin Trails is also part of the major tourism associations, such as Tourism Kelowna, Tourism Kamloops, the Thompson-Okanagan Tourism Association, Destination BC, and Indigenous Tourism BC.

With regards to business requirements, Greg and Frank have to be first aid trained, including having water safety and a skippers' license. These need to be updated regularly. Their business license allows operations anywhere in the Okanagan or beyond, which enables them to provide location options and customizations as discussed later.



Fig 1: Moccasin Trails Brochure (CC BY-NC-ND 4.0)

9. The Experiences

Moccasin Trails includes three distinct segments:

- Educational — Speaking and educating as it fits into the institution's curriculum, for example, at universities such as Thompson Rivers University, the University of British Columbia, Okanagan College, and School District 23. However, this section will not be the focus of this case since marketing is less applicable here.
- Tourism — Generally speaking, during the summer when schools are on break.
- Corporate — Team building and staff training, mostly during shoulder seasons.

After identifying the gap in Indigenous tourism offerings, Greg and Frank built their product through conversations with elders and community leaders. Moccasin Trails provides experiences, such as canoeing and hiking, to introduce visitors to the Indigenous culture of the region, from Osoyoos to Kamloops, covering Secwépemc and Syilx territory. They share places of significance and history, monuments, and stories told by elders. The focus is on providing education about the region's specific language, ceremonies, songs, stories, people, and legends.

Example 1: Canoe tour on Lake Okanagan, visit an Indigenous winery, stop at Kekuli Café to taste bannock, or stop at the museum to see artifacts and learn about Syilx culture.

Example 2: Guide visitors on a 3-day tour, staying at Quaaout Lodge in Chase and Spirit Ridge in Osoyoos, providing interpretative talks along the way, such as territory borders, significant features, history, and culture.



OA6A2038: Kathleen Fisher: *The Confluence of South and North Thompson Rivers in Kamloops, BC* (CC BY-NC 4.0)

Canoe tours are limited to 27 guests, which is what the two canoes allow. In general, however, Moccasin Trails has the advantage of flexibility. Locations can be customized, and services can be customized. If desired, guests can fly by helicopter from Vancouver and spend the night in a winter home in the Okanagan, taste wine, and hear stories.

“We’re successful because of [sharing] those places

of significance; you're not going to find them in a brochure. You're not going to find them in an advertisement, in a magazine."

Not only are the offerings customizable and flexible, Moccasin Trails also allows every type of person to have access to the experiences. Accommodations due to abilities, fitness, age, and interest are made. The experiences allow visitors to travel the trails of the Indigenous People, be it along the earth or the waterways.

"We're focused on transforming visitors and on relationships, knowing that profits will come."

On a tour, Greg would provide education on Indigenous history from a general perspective. Adding to this, elders are supporting the experiences to share their knowledge that is specific to the local culture (e.g., traditional plants and medicines). Guests are taken on ancestral paths, such as hiking to Coyote Rock in Kamloops, paddling a lake or river, sharing stories, and explaining why Indigenous People of the region do, speak, eat, and wear what they do.

Very different from a regular hike, guests are taken back to the way the ancestors lived. They see and live the history. They are encouraged to ask questions, and Moccasin Trails wants them to leave with a deeper understanding and appreciation of the Indigenous culture, breaking down stereotypes and providing an Indigenous lens. Greg often brings his children on the tours, teaching them to share who they are as Indigenous individuals, thereby also making guests part of the family.

"In order for us to truly educate our visitors, we have to tap into their five senses. They have to see us. They have to smell it. They have to taste it. They have to hear it. They have to feel it."

For corporate team building, the company provides

experiences for staff to learn about Indigenous culture, such as being in a canoe, working as a team, and listening to elders talk about the importance of community. Greg trained as a facilitator through the Aboriginal Coaching Manual and brings this to the team-building experiences. Organizations such as the Kamloops Aboriginal Friendship Society partner with Moccasin Trails to educate their staff.

Watch Video Clip 2: MT Experience ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=229>

10. Physical Products

A portion of the original startup money was used to purchase hats and shirts. They were meant for staff, providing something resembling a uniform. A larger batch of simple hats was ordered with plans to sell them; however, that batch was given to one of the owners to enable fundraising for a sick child, and it sold in 10 minutes! Additional orders of hats and shirts will be sold on the website or “out of the van” at experiences. A partnership with Okanagan Lifestyle Apparel (see Promotion) might support this project.

11. Cultural Sensitivity

With the sharing of Indigenous culture comes the question of sensitive locations and ceremonies. Moccasin Trails does their due diligence when involving the local community and elders. For example, the pictograph site visited on the Kelowna tour is a very sensitive subject, and conversations with the guests educate them on preservation and respect of the site. No sweat lodge experiences are offered, but they could be included in the future after consultations with the community. The local Indigenous communities always have ownership of what is shared; Greg is an outsider to the Okanagan nations, even though he lives here.

Within Canada, this type of company would not have been possible 10 years ago. As a culture, the Indigenous community was not ready spiritually, mentally, culturally, or physically to share. The memories were still too painful, and a lot of healing and reconciliation had to happen, but today, the cultural leaders are ready to share and move beyond the traumatic history.

The non-Indigenous side of the Canadian population has also changed dramatically in the last 10 years. Stereotypical viewpoints were common in the past. Today, universities and school districts are connecting with local Indigenous nations to let them write curriculum about their history and culture. As mentioned above, Moccasin Trails gives presentations at schools and universities; however, this is not the focus of this case.



**THE JOURNEY
STARTS HERE**

2-hour canoe journey on
Little Shuswap Lake
British Columbia

**Moccasin
TRAILS**

Monday - Sunday
Mornings 10 am - 12 pm
Afternoons 2 pm - 4 pm

Canoe Rates
Adult: \$75 pp
Youth + Seniors + Corporate (10+): \$50 pp

Salmon Dinner at Quaaout Lodge
lunch / dinner Add: \$21.75 / \$53.25 pp

**Quaaout
Lodge**

WWW.MOCCASINTRAILS.COM | 250-319-4902

Fig 2: Moccasin Trails brochure (CC BY-NC-ND 4.0)

12. Customers

Due to the three segments of the business, the customer base is varied. This section will focus on the tourism customer. Schools and other educational institutions are not targeted with marketing; instead, they are accommodated mainly during the off season. For the corporate market, Moccasin Trails targets corporations, government agencies, and sports teams.

Current trends see customers travel the world to learn about the foods, songs, and traditions of Indigenous cultures, but they also show interest in local Indigenous communities. It is the perfect time to address this desire, which is also influenced by the Canadian government making efforts to have Indigenous culture at the forefront of their messages. Moccasin Trails uses Destination Canada's Explorer Quotient Profiles (2015) as a segmentation approach and targets the Cultural Explorers profile (pp. 27–28); this means, there is more focus on education and not on targeting hardcore adventure seekers.

Generally speaking, most ages and backgrounds are suitable for the experiences. This could include local or BC residents on a staycation, with Vancouver being a major market. Experiences in Kelowna attract mostly private travel, such as families coming for the beaches, wineries, or golf. Often without an itinerary, a tour for education and spiritual learning fits most schedules.

Guests of the Kamloops experiences are often part of group travel, such as bus tours from Vancouver to Banff. Greg works with travel agents and wholesalers that distribute packages to international tour companies, becoming part of their 5–10 day itineraries.

Pilot tours have assisted in fine-tuning activities, like eliminating hikes with steep terrain, but Moccasin Trail has

not hesitated to accommodate special requests. For example, a guest in a wheelchair was fully integrated without “special treatment,” creating an unforgettable experience, which she frequently shares in her talks about accessible tourism. It also changed the outlook for Moccasin Trails, spurring plans to apply for grants for accessibility adjustments in the canoe and to work with non-profit organizations dealing with accessibility.

Watch Video Clip 3 – Accessibility ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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13. Competition

The obvious competitors are other alternatives for activities, be it for families, for individuals, or for tour companies to include in their itinerary. Visitors to Kelowna could visit wineries, they could spend time on the beach, or they could select adventure tours. To address this, Greg plans to partner with that competition, such as wineries in the local area (e.g., visiting the Indigenous World Winery).



IMG_0945: Kathleen Fisher: Sandy hills and sagebrush in Kamloops, BC (CC BY-NC 4.0)

In the big picture, travelers could choose to go to Disneyland, Universal Studios, or Six Flags. It requires an effort by the region and British Columbia to encourage travelers to stay in BC, which the tourism associations are working on.

14. Pricing

Pricing is mainly based on the goal to compensate fully for all intellectual property, meaning the knowledge and time of elders. These costs are based on conversations with the Indigenous knowledge keepers. This is balanced with the prices that are affordable for the customers, especially families, and finding a middle way where a margin remains for Moccasin Trails. Fixed costs for package segments, such as museum entries or plate fees at wineries, are combined with running costs, such as fuel and computer use. Consultations with Tourism Kelowna, as the market experts who conduct a lot of research, also influence the price point.

Price example:

Canoe tour in Kelowna, 3 hours in duration, led by an Indigenous knowledge keeper, including pictograph site, songs, ceremonies, wine tasting at the winery, and lunch. \$95

Different from other tourism providers, Moccasin Trails' prices are transparent and stated on the brochures and website. Currently, the minimum participant number is listed as six, but adjustments may be possible, depending on the tour, since fixed components make it less flexible.

Pricing for tour companies for Kamloops experiences are typically negotiated with the agencies or wholesalers. The tourism associations provide advice on suggested pricing as well as industry-typical discounts.

When minimum participants for a tour are not reached, Moccasin Trails might contact guests and offer to run the tour

at a higher price for each guest or eliminate some segments. Again, making sure that Indigenous knowledge keepers are compensated is the highest priority with regards to pricing. This might become less and less of an issue as the operation grows.

Moccasin Trails focuses on education without having to make the finances a critical piece. There are opportunities to send proposals to the government, which is very supportive of Indigenous businesses. These funds could be used for marketing expertise and consulting (see Promotion).

Watch Video Clip 4 – Business to Business (B2B) ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Watch Video Clip 5 – Pricing Model ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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15. Promotion

Within the tourism aspect, Moccasin Trails works closely with major associations, such as Destination BC, Thompson-Okanagan Tourism Association (TOTA), Tourism Kamloops, and Indigenous Tourism BC. These groups distribute brochures to their partners (e.g., hotel/motel associations and visitor centres), and they announce new offers in their newsletters and promote them on their websites.

The associations also employ market research teams that investigate target markets by Explorer Quotient (EQ) types, postal codes, and so on. This information is critical for Greg to focus the advertising budget, such as targeting Cultural Explorers in Vancouver and reaching them with newspaper or digital ads, brochures, and their website.



Fig 3: Social media presence promotion in the Moccasin Trails Brochure (CC BY-NC-ND 4.0)



Fig 4: Promoting experiences in the Moccasin Trail brochure (CC BY-NC-ND 4.0)

In Kelowna, Greg works with Tourism Kelowna to access hotels through the association's mass email distribution list. To further assist the hotels recommending Moccasin Trails to their guests, he has also personally developed relationships with key hotels, such as the Delta Grand, providing brochures and engaging the front desk staff. This direct marketing approach allows the hotels to recommend the Moccasin Trails experiences and provides incentives, such as discounts for the

hotel or guest. Moccasin Trails' brochures are also featured on the website and on social media.

In the larger picture, the company is starting to build relationships with the Indigenous Tourism Association of Canada, being part of their tours for wholesalers. That would also allow access to reduced rates for trade shows, such as Rendez-vous Canada, the nation's largest tourism trade show, either in person or represented through the associations.

Moccasin Trails has started conversations with Air North to take advantage of the direct flights from Whitehorse to Kelowna and provide packages for their guests (e.g., three days). In addition, they discussed training Air North staff to provide a welcome and a short explanation of the traditional territories they land in. Moccasin Trails has not worked with the larger airline companies, instead relying on the tourism associations and their relationships with them.

Purchasing ad space in the guidebooks published by the tourism associations is another promotional avenue. For example, TOTA features "Route 97," which is a cross-border cooperation to market the Highway 97 corridor, and Tourism Kelowna publishes visitor guidebooks. Newspaper ads have not been used. Moccasin Trails does own two large banners that will be used in strategic locations, such as Hotel 540 in Kamloops, hopefully expanding to Kelowna hotels.

Social media promotion currently happens through Facebook, which is handled by Frank, and Instagram, which is handled by Greg. Help is needed to have a social media plan and make posts consistent. The owners have found that social media promotion takes a lot of effort and time; ideally, a social media expert would be utilized but is thus far cost prohibitive. Moccasin Trails tries to post daily but also realizes that responsiveness is key, meaning engaging with customers, replying to comments, providing contact information, and so on. A consultant could also help with the desired digital

advertising, such as search engine optimization, Google Ads, Facebook ads, or popup ads.

For the corporate customers, limited resources have been spent to promote this segment. Word of mouth seems to have worked; however, Moccasin Trails plans to make themselves more visible to industry leaders. Greg also wants to utilize his sports connections. Okanagan Lifestyle Apparel — a local apparel company with a similar philosophy of relationships, community, and ethics — are interested to learn more about Indigenous culture and to include it into daily business operations (e.g., a daily ceremony). Moccasin Trails will be featured in their list of things to do for locals.

Based on this, the marketing approach for both Kelowna and Kamloops can be considered B2B. There is no direct connection with the customers, instead relying on ambassadors, front desk staff, and visitor centres. This includes the educational component where Moccasin Trails works with schools and universities on a request basis without promoting these services.

Currently, the company's biggest challenge is to find experts to help with the marketing. This would involve target markets, advertising, branding, logos, and digital advertising. For example, a second, circular logo without text is conceptualized to add to the existing one. Aforementioned grant proposals could provide funding for this, applying through band offices or non-profit organizations. A consultant would be needed to update the marketing and business plan.

“The biggest challenge for us right now is expertise. We’re experts in the Indigenous culture and the storytelling and [...] building partnerships. We’re far from experts in marketing.”

Greg admits that the company could do a better job evaluating the experiences based on feedback and metrics. They have conversations with guests but no formal process. It would be

useful to capture the transformation and special feelings that visitors go through and use it for marketing. TOTA works with Telus, collecting data on travel destinations, personal data, and duration of stay, combined with their phone searches.

Watch Video Clip 6 – Marketing Materials ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Watch Video Clip 7 – Customer Feedback ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=245>

16. Looking Ahead

Moccasin Trails plans to grow the business, expand the family, and build new relationships with other Indigenous communities within BC and internationally. There seems to be a lot of interest. For example, the ex-chief in Penticton would like to get involved in tourism and knows the sites of interest in his area. Moccasin Trails is looking for local champions who are in tune with their culture, share the same values, and focus on the education of visitors. This could lead into franchising opportunities, such as “Moccasin Trails Penticton.” As things progress, Greg and Frank could manage at the business level, rather than leading the trips. A wishlist of partners includes wineries, golf courses, and hotels. The wishlist for expansion also includes funds to purchase a van to accommodate multi-day adventures; up until now, they have been renting.



20x16IMG_7362 copy@0: Kathleen Fisher: Grass, Illuminated by the Sun in Kamloops, BC (CC BY-NC 4.0)

A noteworthy opportunity is the high-end tourism segment, offering customized and private packages. After proving over the years that they are a valuable partner, Moccasin Trails was approached by the Rocky Mountaineer, and they plan to work together in the summer of 2020. Additional plans call for a future top first class travelers on the train that Moccasin Trails can serve with special private experiences, such as a night in a teepee or a winter home.

Greg also identified a premium opportunity in Victoria, involving a high-end service centre. First class visitors are looking for Indigenous experiences, and with the permission from the local band, Moccasin Trails plans to build up this business and later transfer it to the local community to run. It has significant potential and might involve the relocation of Greg's business partner.

Greg would also like to approach retired NHL players in Kelowna. Taking them on a special tour with their families would create a lot of buzz throughout their extensive social media followings and attract a high-end market and influencers. For the company's social media platforms, they would like to explore linking Facebook, Instagram, and Twitter to cross-post all content.

Using Stats Canada or the research undertaken by tourism associations, the company would also like to target specific locations (e.g., with mailouts). People get a lot of emails and social media messages, so they plan to stand out with paper-based advertising. A new booking system would also allow to reduce reservations taken over the phone and enable the collection of feedback through the system, including permission to use their testimonials and pictures.

Over time, other aspects of Indigenous culture, such as sweat lodges, could be added after thorough consultation. Greg anticipates that Canadians are going to make an effort to build relationships with Indigenous nations through education, both in schools and through self-initiated research for the older

demographic that was part of the previous curriculum. This will lead to a deeper respect for and stronger relationships with Indigenous nations.

Other opportunities include branching out into organizing golf tours and other packages, serving Okanagan tourism rather than strictly focusing on Indigenous culture and eliminating the need and expenses for Indigenous leaders.

17. Resources and Credits

Resources

Information included in this case study was collected during a personal interview with one of Moccasin Trails' owners, Greg Hopf. All quotations listed in this case study are from the interview with Greg Hopf in Kelowna, BC on January 27, 2020.

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References

Destination Canada. (2015). Explorer quotient profiles.
https://www.destinationcanada.com/sites/default/files/archive/2013-01-01/Tools_ExplorerQuotient_Profiles_2015_EN.pdf

Credits

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PART III

QUAAOUT LODGE CASE STUDY

18. Introduction

On January 14, 2020, an interview was conducted with Alexandra Miede and Cammeo Goodyear. The meeting took place at Quaaout Lodge in Chase, BC. The interviewees shared with the case study team their background, experiences, and plans for the lodge, specific to their areas of responsibility and history of employment.

In addition, information was contributed in written form by Adam Blair, General Manager and Executive Golf Professional at Quaaout Lodge.

Interviewees

Cammeo Goodyear is the Rooms Division Manager, managing housekeeping, front desk including tours, reservations, and administration. She was born and raised in Bella Coola, BC and completed most of her education in Kamloops. While visiting Quaaout Lodge, Cammeo felt an instant connection: “I walked through the doors and told my husband that if I couldn’t work here, I couldn’t work anywhere else.” After starting as a part-time employee, she now manages multiple departments.

“It’s just such a beautiful, beautiful place, and what the Quaaout Lodge stands for for the local community is absolutely amazing. When I walked in, I just found myself so calm and so grounded, and [...] I just fell in love with the feeling of this place.”

Alex Miede is currently the Director of Sales and Marketing at Quaaout Lodge, having worked on location since mid-2018. She is local to the Shuswap area, and her education includes

a Bachelor of Tourism Management as well as an Events and Convention Management Diploma from TRU. Her work experience also includes the golf industry. She also connected strongly with the lodge and its surroundings during her interview, calling it “unique and really special to be a part of.”

Adam Blair, General Manager and Executive Golf Professional, contributed via email. It is apparent that all departments work closely together, communicating and leaning on each other, to produce a team effort.

“We are a family here.”

19. Teachers Resources

Course Fit

Analyzing the marketing challenges presented in this case encourages students to conduct research into topics such as Indigenous businesses, unique marketing challenges, approaches to create strong brand identities, product selection, and tourism marketing. Students will suggest marketing strategies that take into consideration the factors outlined, to help Quaaout Lodge grow and succeed into the future. By analyzing this case, students will be exposed to the following marketing topics:

- Marketing Strategy
- Marketing Research
- Competitive Advantage
- Brand Identity
- Brand Loyalty
- Indigenous Business
- Tourism Marketing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communications

The analysis opportunities given through this case fit any intermediate and advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic marketing courses as well as specific marketing topics, such as marketing strategy, marketing research, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have covered. Below are some suggestions for topics that can be covered through an analysis of this case.

Consumer Behaviour:

- Apply Maslow's Hierarchy of Needs to this case
- Apply decision-making concepts and steps to this case
- Apply attitude models to this situation and target audience
- Apply concepts of cultural values and reference groups to this case
- Identify suitable subcultures to be targeted
- Assess the significance of the cultural component
- Identify cultural influences on the behaviour of the lodge's customers

E-Commerce:

- Determine key performance indicators obtainable from web metrics
- Assess consumer behaviour on the website
- Research the objectives for an improved website
- Recommend website modifications based on values and objectives
- Research opportunities to tie into other e-commerce operations

- Evaluate and accommodate the use of mobile devices for bookings

Advertising:

- Identify and evaluate suitable print publications for advertising
- Evaluate research on the effectiveness of radio advertising for Quaaout Lodge
- Design an advertising plan and budget for social media ads
- Investigate the necessary return on investment for a dedicated social media planner
- Investigate the costs and value of brochures
- Identify trends in road-side advertising
- Suggest incentives for referrals and word-of-mouth advertising

Tourism Marketing:

- Suggest additional services that could appeal to tourists, locals, corporate, and wedding guests
- Determine appropriate channels for marketing this accommodation option
- Determine trends that affect what activities and surroundings tourists choose in BC
- Research the success of other tourism attractions with an Indigenous focus in BC
- Investigate current trends in tourism marketing
- Assess the intersection between the tourism industry and the wedding industry
- Assess the benefits of working with tourism boards

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Actively encouraging referrals with discounts and incentives
- Working with the tour bus companies to create value for extended guest stays
- Strengthen the connection to local artists and Elders to support the culture department
- Establishing ties with other tourism attractions in the area
- Establishing new opportunities for outdoor activities
- Using contact information, such as email, for direct marketing
- Expanding winter activities and promotions
- Targeting pet owners in promotions
- Communicating and utilizing the lodge's environmental awareness
- Incorporate new trends in food, culture, and fine dining
- Address trends in wedding planning and design

Sample Instructions for Students

Considering the information given in this case study, your task is to apply marketing and consumer behaviour concepts to recommend a marketing strategy and approach for Quaaout Lodge. Please note that the goal is not to find out what was actually done but to research options, explain your decisions, and elaborate on your chosen marketing approach. The emphasis is on justifying your choices by utilizing your

knowledge of marketing theories and concepts as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 25,000 per year

Components: SWOT, competitive analysis, marketing channels, marketing messages, timing/schedule, brand personality, target audience

The goal is to strengthen Quaaout Lodge's position in the tourism market, building on its strengths, unique aspects, and history. Restrictions and limitations should be considered when evaluating recommendations. Students should also focus on suggestions that create brand loyalty and form long-term relationships for Quaaout Lodge.

All recommendations should be based on a detailed analysis of the target audience(s). Key performance metrics should be recommended and justified. Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors, and justify any long-term strategy modifications. Recommendations should integrate multiple marketing channels with a combination of mass communications—such as advertising, promotions, or events—as well as personal communications—such as direct marketing, word-of-mouth referrals, or personal selling.

20. Overview of the Business



Figure 1: Winter sun at Quaaout Lodge and Spa (CC BY-NC-ND 4.0)

Quaaout Lodge is located just outside Chase, BC in the Thompson-Okanagan region. The lodge is situated on the land of the Little Shuswap Indian Band that also owns the lodge. At this location in the Shuswap, the lodge is surrounded by lakes and mountains, making it a very unique venue. Only a 3-minute drive from the Trans-Canada Highway, it's a quiet, secluded world.

Quaaout means "when the light first touches the land." In the planning stages for the lodge construction, the Elders and the people came out in each of the seasons. They took wooden

stakes and marked all the spots where the sun first touched the land. The lodge is built within those stakes.



Figure 2: Inside the lodge (CC BY-NC-ND 4.0)

The lodge was built “by the band, for the band.” Band members can enjoy what the lodge offers, and it also provides employment to both band members and locals; band membership is not a condition of employment. The lodge relies on the community (e.g., working with Elders to educate the culture department), and the community relies on the lodge. Due to this unique background, Quaaout Lodge is able to offer traditional hospitality services but also distinctive Indigenous experiences and culture. Artwork and pictographs throughout the lodge showcase the connection to local Indigenous culture.

For the last 13 years, the grounds have featured a golf course. It was added when management felt that additional amenities were needed to draw guests to the lodge. A golf course was

the most desired option and has proven very successful in increasing bookings.



Figure 3: Guest Room (CC BY-NC-ND 4.0)

As opposed to competitors, Quaaout Lodge allows pets and children. Environmental concerns are addressed by using biodegradable items in the guest rooms and spa, composting food and growing vegetables in the greenhouses to supply the restaurant. Natural products are used for cleaning.

21. Products and Service Offerings

Besides nightly hotel accommodation, Quaaout Lodge has multiple areas of services they focus on (also see Promotion).



Figure 4: Winter Day at Quaaout Lodge (CC BY-NC-ND 4.0)

Weddings keep the lodge very busy, with all Saturdays for the current year already fully booked as of January, and they are already taking reservations for the next year. Clients enjoy the fact that everything is in one place. There are many customizations and choices for the ceremony location and menus available, with the scenic location on the lake being a big draw. The lodge offers complimentary menu tastings and encourages wedding guests to book a two-night stay for

the opportunity to relax, while the bride and groom have two nights' accommodation already included in their package. Some couples even helicopter in!

Food offered at Quaaout Lodge is influenced by the Indigenous culture of the surroundings (e.g., bison burger). Prime Rib Friday is very popular, and guest chefs such as Ned Bell, a well-known Canadian culinary talent, have cooked at Quaaout Lodge. Wine tastings with featured wineries of the region complement the menu. A taste series runs through the winter, and the lodge offers Valentine's Day specials (e.g., five-course meal and night for \$199). A fixed-price, buffet-style Sunday brunch attracts customers from Kamloops and Salmon Arm, and there are special brunches for Mother's Day, Valentine's Day, and more.

Cultural services are accessible for every guest, including wedding guests. There are daily cultural activities they can sign up for, following the schedule posted on the website. For example, horticulture tours are offered to introduce visitors to foraging by seeking out wild potatoes, wild onions, garlic, and huckleberries in the surrounding landscape. A representative from the culture department can be found in the lobby to work with customers' requests. A traditional winter home, called a kekuli, is found on the property as well as a sweat lodge that has been rebuilt and is used for weddings. This is truly traditional to the Secwépemc culture, making it a unique experience.

Watch Video Clip 1 – Guest Experience ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=262>

Members of the local band community can use the lodge (e.g., for swims) since there is no other pool in Chase. Overall, the lodge tries to share with guests the region, its history, and its natural offerings, rather than just the building. Other popular events include corporate retreats, Christmas parties, New Year's celebrations, strategic planning meetings—especially at the start of the year—and birthday parties. Locals come for spa services, though more often for the food. The surroundings offer many opportunities for hiking, fishing, biking, snowshoeing, and watching the sockeye salmon run in nearby Tsútswe'cw Provincial Park.

22. Indigenous Community Involvement

Built on the land of the Little Shuswap Indian Band by the band, the vision of the lodge upon its inception was that of hope for the band and its community. While *all employees are welcome, regardless of band affiliation*, the band did want to provide a channel for community members to learn the necessary skills to have long and prosperous careers, to have a place that they could use and be proud of, and to have an opportunity to share their stories with the world. It was the Elders' vision that created the lodge, and they are often consulted about decisions on activities, growth, and boundaries of sharing cultural heritage.

Pictograph Explanations



















	Secwepemc pictograph for Chief.		Secwepemc pictograph for Eagle.
	Secwepemc pictograph depicting a young female's ceremonial vision quest.		Secwepemc pictograph for sun rise and pit house.
	Secwepemc pictograph for the Family Spirit Guide, the Eagle.		Secwepemc pictograph for lizard and bat.
	Secwepemc pictograph for owl.		Secwepemc pictograph representing a hunting ground. Each arrow would keep a record.
	Secwepemc pictograph of a male representing status in the tribe.		Secwepemc pictograph of female and children.
	Secwepemc pictograph of Quaaout: When the sun's rays first touch the land.		Secwepemc pictograph of the loon and stars.
	Secwepemc pictograph of a human addressing the snake.		Secwepemc pictograph of a male representing a spiritual status in the tribe.
	Secwepemc pictograph for Frog.		Secwepemc pictograph of a Mule deer with its tail up, possibly indicating mating season.
	Secwepemc human fishing weir. Possibly drying of the salmon.		Secwepemc pictograph of a Coyote Pack. Representing a vision or possible encounters.

Figure 5: Materials provided at Quaaout (CC BY-NC-ND 4.0)

Indigenous culture radiates throughout the lodge, be it through the food offerings, the use of local products and traditions in the spa, or the activities offered. For example, the chef works with local foragers to include mushrooms and huckleberries found in the surroundings into the food creations. Local band members also contribute services and

traditional expertise, such as selecting local teas and native herbs for the winter home. Immersion in the culture can include archery, drum making, paddle painting, and storytelling integrated into walking tours. Local and Canadian Indigenous artists also contribute to the room design (e.g., Manitoba Mukluks).

Watch Video Clip 2: Employees ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=266>



Figure 6: Quaaout Lodge Foyer (CC BY-NC-ND 4.0)

Local community members are hired and trained in any

department they are interested in, such as housekeeping, front desk, or the kitchen. All employees, no matter their background, can take part in Secwépemc language classes, offered twice a week. This enables employees to greet visitors in the local language, in person, or via email. Employees are knowledgeable in the lodge history and significance (e.g., explaining pictographs). Employees can also take part in the storytelling in the kekulis or drum making.

23. Customers

Given the variety of offerings, Quaaout Lodge attracts a wide range of customers, from local Elders and seniors to brunch fans and staycation visitors. With the authentic cultural experiences offered, they are described as “explorers” by the management team. The sections below outline the main customer segments.

Bus Tours

Many bus tours have put Quaaout Lodge on their itinerary. Guests appreciate the Indigenous education opportunities, such as listening to stories in the winter home, singing songs, or cooking salmon over a fire. In the past, a one-night stay was typical as many tours turn around in Banff, Alberta. Quaaout Lodge has been encouraging the companies to increase their stay to two nights in order to provide these guests more daylight and time for activities, such as spa or golf, which are closed in the evenings. Guests also seem to prefer Quaaout Lodge over a night in Kamloops for the unique experience.

“And we get so many people that come through our doors that are here for less than 24 hours that don’t want to leave. They want to stay longer because they want to experience more while they’re here.”

Other Groups

The lodge accommodates many travelling hockey teams in the winter as well as snowmobiler groups. Golf groups have arrived

from Korea, India, and other international locations, often after discovering the lodge on a bus tour or as part of a Thompson-Okanagan or BC Golf Tour. First Nation bands also book frequently, either as groups or individuals.

Individual Travelers

Quaaout Lodge receives many repeat customers from Kamloops, Calgary, or other areas in Alberta, with many Albertans having seasonal homes in BC. Some have childhood memories of the Shuswap area and bring their families to experience the area. More and more, the “foodie culture” is attracted to Quaaout Lodge, due to the unique menu offerings.

Locals

The local community also uses the lodge, such as seniors joining the aquafit classes. Others enjoy the food menu at the restaurant (e.g., brunch, Prime Rib Friday). Local schools also visit the lodge from Kamloops, Chase, Sorrento, and so on, often involving storytelling or archery. Young families might go swimming and then eat lunch.

Watch Video Clip 3: Food ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=268>

Corporate

Many bookings are made for corporate retreats or strategic planning meetings. This often involves team building activities with a cultural aspect, such as drum making as a team. Participants frequently choose to add additional nights after a meeting.

Wedding

Wedding bookings are mostly made from Calgary residents or other areas in Western Alberta. Some local or Vancouver-based couples also make wedding reservations, as do residents from the United States, due to the favourable exchange rate and possibly with ties to the area.

What is consistent across all the customer groups is the desire to learn about the culture, to immerse themselves into the Secwépemc history and traditions, and to experience the activities offered.

24. Pricing

The lodge has been lucky to achieve a high occupancy rate. It is often fully booked in the summer, and even the winters are getting very busy with the weekends filling up (e.g., with snowmobile groups). It appears that the pricing encourages this success. The interviewees stated that they are comfortable with the current pricing, and even though they monitor the competitors, they have not felt the need to make drastic changes, despite selling out often. A slight price increase was initiated after renovations in 2019, but prices still appear affordable enough to allow a large market to visit.

Price examples for 2020, before tax, include the following:

2 nights, weekend	March	\$338
1 night, midweek	February	\$149
2 nights, weekend	July	\$558
1 night, midweek	September	\$199

Packages such as weddings, bed and breakfast, golf, or spa are often flexible with regards to pricing and attracting various customer groups (e.g., reduced spa packages in the winter or summer golf packages). The price for weddings increased for 2021 bookings, and a review of the effect will determine 2022 prices. The off season has reduced rates, and rooms are discounted if booked for two nights. Some effort is made to encourage customers to book higher-priced rooms (e.g., jacuzzi rooms) or packages, either through promotions, during bookings, or at check in.

Currently, no loyalty program is offered. Discounts for locals

are being discussed, such as offering reduced accommodation prices or food if paying for golf. Snowmobilers can receive a discount when they visit certain popular snowmobile areas.

25. Competitors

The management team at Quaaout Lodge does review competitors' offerings and pricing on a regular basis. Research is critical; however, mostly it has confirmed the decisions made at the lodge about offerings and prices.

As an example, Sparkling Hill Resort & Spa, located in Lake County north of Kelowna, is a competitor, specifically for the wellness aspect. Prices are higher, and the resort does not offer weddings nor does it allow pets or kids. Other competitive considerations are Sun Peaks Grand or resorts in the Banff area for bus tours. Local venues are available for weddings but do not offer all in one place as a package (e.g., ceremony, food, accommodation, and activities).

Participants in corporate retreats often want to be in a city to take advantage of "things to do," and Quaaout Lodge is secluded. Therefore, the lodge is appropriate for the right corporate meeting and not so suitable for others.

26. Promotion



Figure 7: Product provided at Quaaout Lodge (CC BY-NC-ND 4.0)

This section attempts to summarize how Quaaout Lodge has approached the promotion and marketing of their products and services. It also provides information on planned or anticipated necessary changes. Overall, the main focus for the lodge's message is the authentic Secwépemc culture. The lodge was built to share this culture; it is unique, and it is an experience. Factors that penetrate most marketing messages also include the amazing views, the artwork, and the pictographs.

For their promotional planning, the lodge uses a combination of employees and the help of tourism boards. Representatives of Quaaout Lodge are members of the Thompson Okanagan Tourism Association (TOTA), the Indigenous Tourism Association of Canada (ITAC), and work with Tourism Kamloops, Shuswap Tourism, Destination BC, the North Shuswap Chamber of Commerce, the Chase Chamber of Commerce, and Shuswap Arts. Members of the management team also travel to a variety of trade shows, such as wedding shows, industry conventions for tour companies, and the International Indigenous Tourism Conference (IITC).

Watch Video Clip 4: Clients and Market ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=276>

Probably the most effective channel and approach to promote the lodge is word-of-mouth referrals. For example, previous wedding guests spread the word about their experiences, golfers may recommend the lodge for a retreat, or tour companies approach the lodge based on comments from their customers or other tour companies' social media channels. While this has worked extremely well, the lodge does not encourage referrals with incentives.

“We always hope that our guests’ experiences are so wonderful that they share with the masses.”


Significant effort goes into using social media for promoting packages. Facebook and Instagram are used to interact with

past and future customers, going beyond just posting pictures and news. Twitter has also been used but not extensively. YouTube has not been utilized except for some recordings of the cultural activities.

Plans are to use Twitter more and possibly expand to using Pinterest as well. To facilitate this expansion, 2020 will see a dedicated employee for social media promotions. This should assist in substantially increasing the social following. The lodge also plans to incorporate more videos (e.g., of cooking or drum making) into their social media messages.

Past golf customers are kept up-to-date with a newsletter, and past food event participants are contacted about promotions. Improved communication with corporate customers is being worked on, such as explaining the options for cultural activities and team building with an Indigenous background. While the website has a section for corporate events, social media is mainly used to reach potential business customers, in addition to trade shows and word-of-mouth referrals from previous guests.

Currently, the general manager is also facilitating a website redesign, since the current website does not properly answer customers' questions about the experiences the lodge offers nor does it provide information about the recreational opportunities of the whole region. A web design company is working with the general manager to identify shortcomings and needs.



RHYS LAUG DARYL ADAMS ADAM BLAIR

Quaaout Lodge and Talking Rock Golf Course

In November the lodge was honoured to be the recipient of the Indigenous Cultural Tourism Award at the Tourism Industry Association of Canada 2018 Canadian Tourism Awards. Our staff also earned recognition at the BC Hospitality Summit, receiving the BC Hotel Association 2018 Housekeeping Award.

The Talking Rock Golf Course and our professional staff have also been successful in receiving significant industry recognition including:

- #1 Public Access Golf Course in British Columbia, Golf in British Columbia Players Survey;
- Adam Blair 2018 Interior Region Professional Development Award, PGA of British Columbia;
- Adam Blair, Top 100 Golf Professionals in British Columbia, PGA of British Columbia;
- Dave Munn, Top 100 Golf Professionals in British Columbia, PGA of British Columbia;
- Nathan Grieve, Top 100 Golf Professionals in British Columbia, PGA of British Columbia;
- Harris Stoneman, Top 100 Golf Professionals in British Columbia, PGA of British Columbia; and
- Nathan Grieve, 2018 Interior Region Candidate for Membership of the Year, PGA of British Columbia.

Programs and Services

- 70 Room Hotel
- Jack Sam's Restaurant
- Conference Centre
- Le7Ke Spa
- Talking Rock Golf Course
- Indigenous Cultural Education Programming

Figure 8: Materials provided by Quaaout Lodge (CC BY-NC-ND 4.0)

In addition to the previously discussed channels, posters are also used locally, especially within the Little Shuswap Indian Band. In 2019, some radio ads were used in Kamloops as well as newspaper advertising. However, it was found that social media provides much more value than radio or newspaper ads, even though reduced local newspaper advertising will continue.

Quaaout Lodge has created brochures that are taken to trade shows and wedding fairs. They can also be found in visitor centres around the province. However, since offerings such as

food or spa services are seasonal, static media like brochures are not ideal.

On the highway alongside Chase, signs can be found facing both directions, including a reminder 10 kilometres before the turnoff. They feature a golf theme, and while “off the highway” traffic isn’t significant, it does happen.

The success of this varied promotional approach is hard to measure. The general manager keeps track of Facebook and Snapchat metrics but also acknowledges that more effort is needed to analyze customer purchase history and spending habits to better target the marketing messages and spending. Testimonials from Tripadvisor, weddings, or other special events are read, collected, and responded to. There are feedback cards in the guest rooms as well. Many reservations are taken over the phone, and while visitors are asked where they heard about the lodge, consolidation and analysis of this information is difficult.

In the words of the general manager:

“Budget constraints limit our ability to really have a significant reach beyond our local region. [Finding] experienced marketers that know how to really speak to customers on a low budget is also a challenge, but we have begun the steps of training our current team.”

27. Looking Ahead

Quaaout Lodge is planning for the future by incorporating trends and developments into their offerings. This includes the following:

- Offering gluten-free meals, vegan options, detox foods, and accommodations of other dietary restrictions
- Expanding the wellness and outdoor aspects to focus on relaxation, yoga, massages, hiking, and being connected to nature.
- Adding activities that include paddle boards, personal water crafts, and regular exercise classes during the week
- Customizing options for weddings, such as craft beer or local wines
- Expanding art offerings to include beading or pine needle basket workshops
- Accommodating visitors wanting to get away from technology into quiet surroundings
- Offering locals new experiences, such as trying archery
- Addressing the need for corporate retreats that include unique activities
- Possibly expanding the golf course

While already being a focus, the lodge has plans to expand the culture department and its activities, including meetings with Elders, improved consultation with the local community, growing the Indigenous culture aspect, and contracting members of the community.



Figure 9: Materials provided by Quaaout Lodge (CC BY-NC-ND 4.0)

A continuous challenge is staffing, even though the lodge has many long-time employees (e.g., a night janitor has been there since the lodge opened!). With limited staff accommodation available, it has been difficult to find employees within driving distance, since the lodge is a 30- to 45-minute drive from Salmon Arm and a 45- to 60-minute drive from Kamloops. Students are temporarily employed during the summer, often

as a stepping stone for those beginning tourism careers. Efforts have been made to establish an employee share program, such as sharing housekeepers with the Mustang Powder heliskiing operation or with hotels at Sun Peaks. Shuttle options are also being discussed.

28. Resources and Credits

Resources

Information included in this case study was collected during a personal interview with Quaaout Lodge employees Alexandra Miede and Cammeo Goodyear; in addition, written communication from General Manager Adam Blair has also informed the details of this case study. All quotations listed in this case study are from the interview with Alexandra Miede and Cammeo Goodyear at Quaaout Lodge in Chase, BC on January 14, 2020, as well as from the contributions made by email from Adam Blair.

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Credits

Alexandra Miede, Cammeo Goodyear, Adam Blair, Quaaout Lodge

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Marie Bartlett, MA, Instructional Designer, Learning Design and Innovations

Justin Frudd, MA, Editor, Curriculum Services

Nicole Singular, BEd, Graphic Designer, Curriculum Development

Jonathon Fulton, BFA, Video Producer, Learning Technology and Innovations Group

Stephanie Gountas, BCS, Curriculum Multimedia Developer

PART IV

SPAPIUM LITTLE PRAIRIE FARM CASE STUDY

29. Introduction

Representing another example of TRU's case studies on Indigenous businesses and their marketing approaches, this case study investigates the marketing activities and issues for a small farm in the Lytton area of British Columbia.



Figure 1 – Homepage of the business. Source <https://spapiumfarm.ca/>. This image may be subject to copyright and doesn't fall under the CC licensing of this OER

It is rooted in sustainable agricultural practices, combined with a strong traditional focus based on the Nl̓eʔkepmx culture and history of the land it is located on. Topics such as agricultural and tourism marketing, Indigenous business ownership, business growth, sustainable agriculture, target markets, and marketing trends are addressed in this case study.

As a significant and important niche business in British Columbia and across Canada, Indigenous business ownership is growing and flourishing. The following case outlines the current situation for Spapium “Little Prairie” Farm (SF), setting

the scene for students to assess marketing opportunities, justify marketing recommendations, and rationalize strategic marketing approaches.

30. Teachers Resources

Course Fit

Analyzing the marketing challenges presented in this case encourages students to conduct research into topics such as Indigenous businesses, unique marketing challenges, approaches to create strong brand identities, product selection, and sustainable food production and its marketing. Students will suggest marketing strategies that take into consideration the factors outlined, to help SF grow and succeed into the future. By analyzing this case, students will be exposed to the following marketing topics:

- Marketing Strategy
- Marketing Research
- Competitive Advantage
- Brand Identity
- Brand Loyalty
- Indigenous Business
- Tourism Marketing
- Food Marketing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communications

The analysis opportunities given through this case fit any intermediate and advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic marketing courses as well as specific marketing topics such as marketing strategy, marketing research, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have already covered. Below are some suggestions on the topics that can be evaluated through an analysis of this case.

Consumer Behaviour:

- Assess emotional and mental responses of consumers who experience SF at its remote location
- Apply decision-making concepts and steps to this case
- Apply attitude models to this situation and target audience
- Apply concepts of cultural values and reference groups to this case
- Identify suitable subcultures to be targeted
- Determine where these subcultures can be found and engaged
- Identify cultural influences on the behaviour of SF's customers

E-Commerce:

- Investigate the benefits of spending time and money to expand the e-commerce operations
- Evaluate the benefits of outsourcing e-commerce services versus in-house solutions
- Identify the need for e-commerce processes based on target markets

- Assess how a co-packing arrangements could affect SF's e-commerce
- Research the objectives for an improved website
- Research opportunities to tie into other e-commerce operations
- Assess how e-commerce operations can address the Indigenous history and ownership of the farm
- Identify competitors in the e-commerce setting

Advertising:

- Determine appropriate information to be included on potential highway signage
- Evaluate research on the effectiveness of radio advertising for local businesses
- Design an advertising plan and budget for social media ads
- Investigate additional directories and partners that could be beneficial for SF
- Investigate specific opportunities, such as rack cards or ads in the Backroad Mapbooks of BC.

Tourism Marketing:

- Suggest additional products and services that could appeal to tourists
- Identify triggers for travellers to stop and explore locally
- Determine appropriate channels for marketing the farm
- Research the success of other tourism options with an Indigenous focus in BC
- Investigate current trends in tourism marketing

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Using the website to sell items that can be shipped easily, providing customers the opportunity to research before a visit
- Pursuing a connection with the Rocky Mountaineer business, currently only stopping in Kamloops, that brings many tourists to the area
- Establishing ties with other tourism and food providers in the area
- Collecting contact information from visitors to the farm, such as email, by using a guest book
- Tailoring the social media content to the typical age of the customer
- Dipping into the RV market by expanding on the camping options
- Focusing on collecting reviews, such as on Google or TripAdvisor
- Weighing environmental concerns against custom-printed packaging to establish a brand identity

Sample Instructions for Students

Considering the information given in this case study, your task is to apply marketing concepts to recommend a marketing strategy and approach for Spadium “Little Prairie” Farm.

Please note that the goal is not to find out what was actually done but to research options. Explain and justify your decisions, and elaborate on your chosen marketing approach. The

emphasis is on justifying your choices by utilizing your knowledge of marketing theories and concepts, as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 3,000 per year

Components: Marketing channels, messages, timing/schedule, brand personality, target audience, advertising media

The goal is to increase exposure for Spapium Farm by applying marketing concepts in various areas (e.g., consumer behaviour), keeping in mind the limited budget and human resources available. Students should also focus on suggestions that create brand loyalty and form long-term relationships for SF.

All recommendations should be based on a detailed analysis of the location as well as the target audience, including creating a persona. Key performance metrics should be recommended and justified. Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors, and justify any product strategy modifications. Recommendations should integrate multiple marketing channels with a combination of mass communications—such as advertising, promotions, or events—as well as personal communications—such as direct marketing, word of mouth, or personal selling.

31. Overview of the Business

Location

Spapium “Little Prairie” Farm is a Nlaka’pamux farm situated in a remote location near Lytton, in the Fraser Canyon of BC. It is south of town and the confluence of the Thompson River and Fraser River. To get to the farm, visitors either have to take a two-car ferry across the Fraser River north of Lytton or walk from the train bridge south of town. It is an area that features many trails, and the famous Stein Valley Nlaka’pamux Heritage Park is just a few kilometers from the farm.

History

The farm has been in the family since 1882 and includes water rights that allow for farming on the property. A long tradition of the family interacting with this land has created a special relationship that encourages sustainable farming methods. Technologies and practices are used that are gentle on the land and consider the water resources. It is a healing destination that was left to the current owner by her grandfather.

The farm is run by Paula Cranmer-Underhill, her husband Brian, and daughters Brianna and Danielle. Lytton is their ancestral land, and the farm was originally founded by Paula’s great-grandparents, Kanu and Isobel Thom, who cleared and fenced the land in 1882. Paula, as a multi-generational residential school survivor, grew up in Vancouver and lived for

a long time in Chilliwack since her parents and grandparents were not able to continue farming on the land during the residential school programs. Paula moved to the area and started operating the farm near Lytton in 2015.

From the website:

Spapium is located at a historic meeting place, TlkemchEEn. Lytton was an important place of peacemaking in the early history of what is now British Columbia. Guests will leave enriched, not by the gold historically sought on the Gold Rush Trail by others, but by the cultural understandings shared through unique Nl̓eʔkepmx culture and history experiences on the land facilitated by your hosts.

Since the inception of the farm, it joined Community Supported Agriculture (CSA) that helps with the challenges of farming. Starting with farming three acres in 2017, which included a diverse orchard with many different fruit varieties, the owners have since added more land and many fruit trees. The location also provides access to wild foods and medicines, such as elderberry, as well as water access from Nicheyeah Creek. Additional land to expand operations is available.

From the website:

There is a need to get back to the land for physical, emotional, and spiritual health, and

farming will provide opportunities to increase personal and community health as well as provide local food security and encourage economic development.

Tourists interested in agriculture, the Nl̓eʔkepmx culture, and the history of the land are educated through the farm's products, services, and story telling. At the same time, the community—especially the youth—benefits from life skills and knowledge created through the farming.

Paula and her family share their Indigenous background and culture by showcasing special items they can interpret, from food to medicine to cedar weaving, teaching visitors how to make bracelets or ropes, and even offering small basket weaving workshops, passing on the teachings they have received from their family. They also always introduce themselves by naming their parents and grandparents, the traditional way of introduction that determines your “place” in the Indigenous culture.

32. Products

Selection and Services

From the website:

We create abundance with a strong social outlook and Potlatch with each harvest to others who need good nutritious food to fuel a healthy life.

Spapium Farm grows fruits and vegetables on their Lytton farm. Freshly harvested, they are sold directly to consumers at the gate, at farmers' markets, and at special events, both at the farm and elsewhere. In the past, veggie boxes were available through subscription. Products offered currently and in the past also include herbs and spices, jams, and teas made from farm products.

Other foods here are tseweta, which is our first green in the spring. [...] You can preserve it like that at that point in time. When it grows out a little more, it blossoms. So, you've got these beautiful blossoms to add to your soups and stews, and when those grow up, they turn into the seeds that we pick for medicine, and some people use them in the sweat lodges and long houses.

Cedar weaving products and workshops complement the food offerings. These workshops have included 12–15 people, but

Paula considers four participants to be the optimal number to be manageable and provide the best service. Paula also creates products from roots that she gently and responsibly extracts from the forest, avoiding damaging techniques that are prevalent elsewhere.

Watch Video Clip 1 – Product Selection ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=292>

The farm offered eggs in the past and recently succeeded in a small business acceleration program application. With these funds, they will revive the egg production, building a chicken coop for 100 chickens by March 2021. Other products previously sold include jars of pickles, beets, and bread-and-butter pickles. Paula also still has clothing merchandise available with designs she printed a few years ago; she has plans to do more screen printing in the future.

Besides mostly selling their own original products, SF also promotes products from other artists and creators, such as jade or an artistic paddle by artist Casey Paul made of Juniper and representing the 'N̓am̓gis heritage. Paula has also collected baskets from the Sts'ailes, where she used to work, and showcases them together with other intricate baskets from Nuuchahnulth.

All of SF's products promote Indigenous culture through the owners' sharing of stories and their encouragement to respect and honour the earth. Every interaction with customers is an opportunity to endorse this gentle treatment of nature and

engage the visitors with local knowledge keepers. The farm itself is conscious of the materials they use (e.g., no plastic bags, reduce waste and chemicals, etc.) and the way they use the land.

Some products feature pictographs that represent the area's non-written history left on the rocks, with the Stein Valley being one of the largest pictograph sites in Canada.

Our ancestors laid all those down there for us, so that we'd remember, and so we have some places to go back to.



Figure 2 – Contributed by the business owner. This image may be subject to copyright and doesn't fall under the CC licensing of this OER

Watch Video Clip 2 – Explaining Pictographs ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=292>

In addition, SF currently has options for rustic camping on the five acres next to the main farm, which they also hope to expand into cabins, teepees, or canvas tents in the future—still rustic, but it’s closer to the “glamping” (i.e., glamorous camping) experience that some visitors are looking for. Providing an option for visitors to stay in comfortable accommodations will mean that those visitors can immerse themselves in the healing aspect of this destination, allowing them to learn, relax and create friendships. The property features multiple benches as well as walking trails and a rock outcrop.

While SF and the Indigenous community of Lytton are happy to share their culture and background, there are certain experiences and items (e.g., sweat lodges) that are historically too sensitive to share with tourists. However, resources such as an Elder at a neighbouring creek are available, one who teaches others about the sweat lodge, including at schools in Vancouver. Any interested customer with respect for the culture could be referred to other knowledge keepers to build a relationship and to learn about special traditions.

Possible ideas for the future include offering natural dyes, shirts dyed with natural materials from the area, as well as a storefront on the property. The remote location limits how many people can access the farm, but more and more tourists on excursions and adventures in the summer time are visiting the farm side of the river.

Distribution

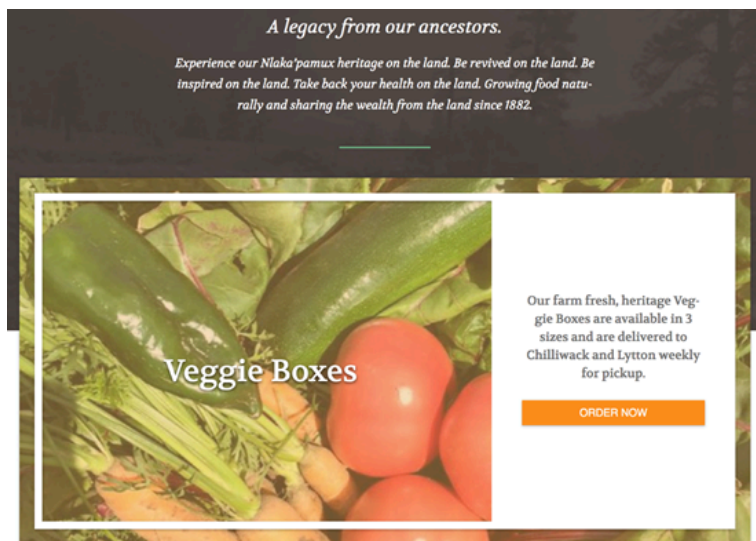


Figure 3 – Business Website. Source <https://spapiumfarm.ca/>. This image may be subject to copyright and doesn't fall under the CC licensing of this OER

SF maintains a website but mostly sells directly to consumers at farmers' markets, such as the Lytton Two Rivers Farmers Market. The nature of some of the products sold (e.g., perishable, heavy, etc.) means that shipping is usually cost-prohibitive; the exception being tea and some weaving products. SF has plans to work with the YeKm Food Hub and their commercial kitchen to eventually co-pack and ship products together, following safety regulations. To support sales, the owners also visit a variety of conferences and workshops in different communities.

Their offerings are also distributed and promoted through cultural tours, such as partnering with other food vendors at Klahkamich, which is just outside of Lytton, and offering cedar

weaving as part of a tour for about 20 people. Other tour participants were reached by working with Princess Cruises for a shore trip out of Vancouver.

Previously, SF has provided vegetable boxes on a subscription basis (e.g., \$20/week subscription for 10 weeks) to Chilliwack and Agassiz residents but discontinued this service. During that time, they also participated in other farmers' markets, such as Ashcroft and Chilliwack.

Pricing

Paula compares prices of produce in the area, mostly with other providers at farmers' markets, but also grocery stores and online. She tries to establish benchmark prices for her products, comparing even with supermarkets. SF's prices are competitive and in line with other options for consumers. People come to the farm knowing the quality of produce they are going to receive and also knowing that there is no markup for these products. If produce is left over, Paula might offer it to customers to try something new.

Most people are more than happy to pay the prices that we're setting.

Prices for unique experiences and cedar weaving opportunities have also been positively reviewed, and Paula affirms that "I've never had anybody complain to me about prices for anything that we're offering." They are considered good value for the money. As an example, at a festival in Merritt, Paula and her family set up a teepee and offered cedar weaving workshops for bracelets, charging \$20—and customers "had no problem" paying that price.

Prices are consistent and do not vary much. The farm doesn't

offer any discounts but will consider their supply and harvest at specific times of the year.

Maybe not our prices going lower, but around harvest time, if we have an abundance of something and we have those customers at the farmer's market, you know, we'll give them a little bit more.

They also donate extra food they may have to a community member in need, a foodbank, or a school. They have donated to Ruth and Naomi's Mission in Chilliwack before as well.

33. Customers

The owners' assessment of their typical customer differs, depending on the products sold. The typical customer for food and produce would be middle to older age and lower to middle income. For the experiences, the typical customer is a bit younger and "middle level of income," including families.

Environmental consciousness and waste reduction is important to SF. As funds allow, the farm tries to promote responsible practices by using compostable materials or reduce packaging and avoid plastic bags. This connects the business with a special type of customer showing an awareness of and effort for environmental issues.

Therefore, both identified customer groups are environmentally responsible, or at least have an interest to choose environmentally conscious products and services. This makes them appreciate SF's low-waste approach and options. Paula classifies them as "lovers of nature and outdoors." They are also respectful of the Indigenous culture and their lands.

To reach those customers, the business would go through local interest groups, finding out where these types of people spend time and what hobbies, lifestyles, and experiences they are interested in. For example, they might be frequenting the Friendship Centre or the local museum. Spapium Farm could also work with one of the local providers of Indigenous tours and ask to be included as a stop on a trail or farm tour. This would access markets including visitors from other provinces and countries.

On social media, most potential customers follow SF on Facebook, but the farm also uses Instagram. Facebook seems to be the best way to reach their target market online.

SF's approach to their customers also clearly focuses on education. For example, some in the Indigenous community

worry that exposing special sites, such as pictographs, opens the door for mistreatment and vandalism, even just touching sacred sites. Paula believes that the customers are interested and open to learn from the knowledge keepers to be respectful to the land and to teach them the values, which they then share with others.

34. Competitors

The immediate, direct competitor for any food item is the local grocery store, the Lytton Market. Other vendors at the farmers' markets compete with SF, as do farm stands along the highway that tourists or local residents might be driving by, though no particular one was identified by SF.

With regards to activities like farm tours, SF competes with companies that offer other activities in the area. For example, Kumsheen Rafting Resort is nearby and very busy in the summer. SF is also on the Gold Rush Trail and, therefore, competing with other local businesses along that trail. Potential customers can always choose non-organized activities like hiking as well.

However, as discussed further down under "Marketing Opportunities," any competitors in the area always have the potential to become partners, creating inclusive experiences and providing reasons for customers to stay longer.

I would definitely agree that anybody that would be, maybe, considered a competitor would actually be considered an asset because of the fact that it's such a small village. Anything going on is actually benefiting us because it's bringing in people to the village.

SF acknowledged that visitors are used to "glamping" these days, and their camping offers might be too rustic for some. As such, there are plans to upgrade accommodation options so that visitors can join additional activities and also have a comfortable place to stay.

35. Finances

The business was 100% personally financed, including all initial travel to acquire inventory. This is still the case, with the family owning the land and all assets.

The marketing budget for SF to work with is \$2,000 for 2021. While this is a starting point, additional marketing opportunities are evaluated and the benefits considered if they arise.

36. Marketing Approaches

SF's challenge is to attract locals in the area to use the farm to buy food, as well as encouraging visitors to the area to stop, participate, and even spend the night. Given the remote location, that is challenging.

Current and Past Approaches

Apart from the “no-go” year of 2020 due to COVID-19 and associated lack of marketing, SF has marketed themselves through social media, mainly Facebook. They also use Instagram, but the highest number of followers is on Facebook, which they also actively promote when out in the communities (e.g., using business cards at farmers' markets). The farm also maintains a website, accessible at <https://spapiumfarm.ca/>, that provides information about the farm, the market schedule, a small online shop, and information on camping, farm tours, and contact information.

Brochures were printed in the past, but given the environmentally conscious approach of the farm, they moved away from paper-based advertising. This also affects the use of business cards and handouts at markets with their “About Us” story on it.

We don't need to print on paper to let people know about our business, and it doesn't really go along with the low-waste thing we're trying to do.

To avoid the use of paper, they plan to focus mostly on online

promotions through paid advertisements on social media via Facebook and Instagram. They hope to increase traffic to the website this way. In addition, there are plans to include radio ads in their marketing approach as well.

Paula enjoys meeting customers face to face—at markets and events—to have the opportunity to tell them about the farm, their business, their products, and to answer questions in person. This kind of “self-promotion” works well and can be followed up by sending interested customers to the website or Facebook. To date, SF has not kept track of where customers heard about them.

SF is a marketing stakeholder with the Indigenous Tourism Association of British Columbia (ITBC). SF has worked with the association to participate in a cruise shore trip, and ITBC also provides online media training that SF takes advantage of to learn more about the online promotion opportunities and skills. Currently, Brianna manages the online presence, incorporating her skills and ideas, but Paula would like to learn more about it to increase her involvement. Ideas are typically discussed between the two of them; Paula might write up the wording, and then Brianna posts it or creates a paid promotion.

During the uncertainty of COVID-19 times, SF focuses more on story telling and staying on their customers’ radar, rather than promoting products or services and being unable to deliver. Ever-changing restrictions and closures have made it hard to deliver what is advertised, and people are looking to learn what is happening at the farm, what the plans are, how everyone is doing, and so on. Besides social media, this is also accomplished through the channels provided by ITBC.

Besides ITBC, where Paula was formerly a director, Spapium Farm is also a member of the Indigenous Tourism Association of Canada (ITAC), Gold Rush Trail BC, and the Cariboo Chilcotin Coast Tourism Association (CCCTA). Paula volunteers for the board of directors for the CCCTA, the Lytton Two Rivers Farmers Market, the 2 Rivers Remix Society, the Sto:lo Business

Association where she was the founding president, and the piye?wi?x kt/Beeya.wEE.hh kt Language Foundation Society.

As for many other small businesses, word of mouth is critically important and valuable for SF. The owner wants customers to enjoy their visit, have a great personal shopping experience, and then share that with others. Paula mentioned that customers get referred by previous visitors quite often. Sharing of social media posts is also a goal; Brianna makes sure that every post looks professional and is visually pleasing, always including pictures besides the text. Posts are typically of the farm and its products. Currently, they are trying to increase excitement about the 2021 season and spreading awareness of the business.

In the past, Brianna has looked at success metrics provided by Facebook (e.g., views, engagement, etc.) but hasn't been able to compile comparisons and long-term trends. ITBC does not provide such metrics from their promotions. Website metrics are also not used to inform decisions, even though Brianna has looked at them in the past. The current COVID-19 situation, with less exposure of the business in communities and at their location, has resulted in reduced website and social media traffic.

Other marketing approaches of the past include a video production of cedar weaving that was promoted by the Tuckkwiowhum Village, which is south of Lytton on the [Gold Rush Trail](#). The village has worked with Paula in the past to provide cedar weaving workshops. Other assets include a feature in the Vancouver Sun, based on a concierge event at a Vancouver hotel that ITBC organized and promoted. All of those appearances will be consolidated on the website.

I think that the community of Lytton is really supportive of each other. Everybody wants everybody to thrive.

Another marketing opportunity was realized when SF worked

with Meghan Fandrich of Klowa Art Café in Lytton. The café carries the farm's cedar weaving in their store, and Paula suggested that they work together on a farm tour using the café's patio.

For us, it's good to partner with people who are interested in working together.

The website is currently not a big contributor to sales, in part because some products cannot be easily shipped (e.g., jams). Most sales are direct, even if customers would check the website first before purchasing products at the farm or at an event (e.g., pow wow or conference). SF does not intend to focus on increased selling through the website and instead uses it to introduce people to the business, its owners, and the location.

Marketing Opportunities

Spapium Farm is used to pulling their own weight when it comes to promoting their business via social media or their website, but they also encourage partnerships. For example, the previously mentioned Kumsheen Rafting Resort is a competitor when it comes to activities in the area (e.g., rafting vs farm tour) but could also be a partner (e.g., farm tour after rafting!).

And that [local] family's big on reaching out to try and work together to get some experiences happening.

The YeKm Food Hub might be able to assist in packaging and shipping additional foods, avoiding the need to plan around excess food for the markets, or they could purchase products to sell through their channels. The small community of Lytton is a supportive environment, where competition is replaced with

care about your neighbour and the wish for all to succeed and thrive. Residents prefer to support each other than to source it from elsewhere.

Watch Video Clip 3 – Community Support ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=300>

Additional and continued activity through the social media channels could be used to spread the word about Spapium Farm. The owners are learning WordPress to update and upgrade the website themselves (e.g., adding testimonials, photos, and destination information). Ads have focused on the local community in Lytton but could target a broader area in the future.

Opportunities for sales through the website still face the issue that some products cannot easily be shipped (e.g., jams, pickled items, etc.). An option would be to focus the website on teas and cedar weaving products, both of which can be shipped cost-effectively.

Another option would be to start an email database and email subscription, as a way to collect information from the customers and also to share stories about the farm or local knowledge keepers. This would enable SF to communicate with customers and vice versa, keeping their name in customers' minds. Collecting email information could be paired with a contest or discounts and would be most useful when SF can offer more products and better shipping abilities. Invitations to workshops (e.g., weaving) can be added. To date,

there have been no surveys or formal feedback collection from customers, beyond the in-person comments.

People are happy with their good food—their happiness, their expression—that sort of feedback. Them inviting us back to do something else.

There is no local TV station, which could be considered for any plans of TV advertising. Radio ads could be an option if it is deemed suitable and effective.

Expanding on their already embraced approach to run the business in an environmentally friendly way could attract new markets and customers. It appeals to a section of the population that is growing and more determined than in the past. These customers are willing to spend time and money to buy the products they fully believe in.

The previously offered veggie subscription boxes could be reassessed for viability. While originally offered in Chilliwack and Agassiz, a new plan would most likely limit the delivery to the local Lytton area, reducing transport costs and issues, at least until enough subscriptions could be collected from other areas to make the transport worthwhile.

SF would like to work with more tour companies and add local partners with formalized and regular arrangements, such as repeating the use of the Chinese History Museum for basket weaving workshops. Cruise shore trips could be accommodated by setting up in a beautiful local setting and being part of the customers' circle loop from Vancouver. Train tours currently only stop in Kamloops for overnight stays, but partnerships might be possible for a side trip to Lytton.

Partnering with accommodation providers like lodges could also increase the bookings for workshops, and SF started creating a workshop package following the Destination BC standards that can be offered to these providers. There are also other associations that can support the marketing efforts, such as the Thompson Okanagan Tourism Association (TOTA).

Last year or the year before, [TOTA] had some kind of a travelling marketing bus that they brought around to festivals and events, and our cedar weaving was part of that.

Currently, operations have to fit into the restrictions of the COVID-19 pandemic. Paula and her family are adjusting and thinking of ways to access the cultural tourists and provide programs and products safely. No major changes are being considered until it is clear what the growing season and potential restrictions will look like.

Spapium Farm summarized their marketing challenges as being able to access higher-income markets. While locals choose them to buy the food they have to buy anyways, they would like to target higher-income customers for their experiences and tours (i.e., the non-necessity items offered).

Watch Video Clip 4 – Targeting Customers ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=300>

Trends

Besides the growing awareness of environmental issues, such as water consumption and waste reduction, which Spapium Farm is already addressing in their operations, a trend towards buying local has also been observed. For Lytton, that involves the YeKm Food Hub.

YeKm, the planting food hub, is meant to enhance opportunities for local growers and processors to develop new products and new ways of preserving foods to extend the life cycle of the food and get it out to the community.

Watch Video Clip 5 – Consumer Trends ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=300>

Efforts to preserve foods and choose organic foods have also grown in recent years.

With regards to activities, SF notices a lot of outdoorsy people around in the area who kayak, hike, or just explore. With technology at their fingertips, they seem to be looking for the “Instagram-worthy” experience that is visually appealing, ready to be posted on social media. The farm and its setting are ideal for those pictures.

During their 5–6 years of operating the farm, the owners noticed that visitors are more and more interested in and respectful of Indigenous traditions, culture, and values. They strive to learn, creating opportunities for the Indigenous communities to share and explain.

You know, they want to take people for a hike in the Stein or take them for a hike to that special berry bush up on the mountain.

Spapium Farm is motivated to expand business and bring their

authentic farm approach to more customers and be a part of the tourism market in BC.

37. Resources and Credits

Resources

Information included in this case study was collected via email and during a personal interview with Paula Cranmer-Underhill and Brianna Underhill. All quotes listed in this case study are from the video interview with Paula and Brianna.

Cranmer-Underhill, P., & Underhill, B. (2021, January 29). Personal interview.

Credits

Paula Cranmer-Underhill and Brianna Underhill, Spapium Little Prairie Farm

Biggi Weischedel, PhD, Open Learning Faculty Member

Marie Bartlett, MA, Instructional Designer, Learning Design and Innovations

Justin Frudd, MA, Editor, Curriculum Services

Nicole Singular, BEd, Graphic Designer, Curriculum Development

Jonathon Fulton, BFA, Video Producer, Learning Technology and Innovations Group

Stephanie Gountas, BCS, Curriculum Multimedia Developer

PART V

BE INSPIRED! EVENTS AND EVENT PLANNING (BIE) CASE STUDY

38. Introduction

Julie John's business—Be Inspired! Events and Event Planning (BIE)—provides a wealth of information for this case study on marketing of Indigenous businesses. As an accomplished entrepreneur, Julie shared the marketing issues and challenges she experienced starting and operating her business from Chase, BC. In this case study, we will explore topics such as target markets, competitors, marketing channels, Indigenous business ownership, entrepreneurship, marketing support, and social media marketing.

Exploring and showcasing Indigenous local culture has been a focus for Thompson Rivers University (TRU) for years. Accordingly, we strive to include Indigenous content into our business courses, which this case study supports by exploring issues experienced by Indigenous businesses. As a significant and important niche business in British Columbia and in Canada, Indigenous business ownership is growing and flourishing. The following case outlines the current situation for BIE, setting the scene for students to assess marketing opportunities, justify marketing recommendations, and rationalize strategic marketing approaches.

39. Teachers Resources

Course Fit

A lot of information is shared by the business owner in this case study. Students will analyze this information and conduct research into topics such as Indigenous businesses, unique marketing challenges faced, approaches to create brand identities and competitive advantages, services offered, pricing, marketing affiliates as well as marketing opportunities, and relationship building. Students will suggest marketing strategies that can overcome challenges from the past and keep BIE successful. By analyzing this case, students will be exposed to the following marketing topics

- Marketing Strategy
- Marketing Research
- Competitive Advantage
- Distribution
- Brand Identity
- Indigenous Business
- Strategic Alliances
- Affiliate Marketing
- Social Media Marketing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communication

A wide range of business courses can benefit from the information presented and discussed here. Analysis can be part of any advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic

marketing courses as well as specific marketing topics such as marketing strategy, marketing research, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have covered before providing this case. Below are some suggestions on the topics that can be covered through an analysis of this case.

Consumer Behaviour:

- Apply decision-making concepts to BIE's potential customers
- Determine steps an organization would go through when hiring BIE
- Apply attitude models to this situation and the B2B target audience
- Apply concepts of cultural values and reference groups to this case
- Identify cultural influences on the behaviour of BIE's B2B customers
- Identify trends in corporate bookings of experiences and team building events
- Research how to affect the experiences and behaviours of event participants

E-Commerce:

- Research the objectives and components of an improved website
- Determine a priority list of expenditures, and justify by estimating the effect on the business
- Research opportunities to tie into other e-commerce operations based on target market
- Identify alternative uses and goals for the website given the target market and product
- Outline how to increase traffic to the website

Advertising:

- Recommend appropriate online advertising for BIE given target market and business size
- Design an advertising plan and budget for social media ads (e.g., Facebook, Google)
- Identify suitable print publications for advertising
- Evaluate research on the effectiveness of radio advertising for local businesses
- Investigate additional service directories that could be beneficial for BIE
- Determine advertising channels that best support word-of-mouth marketing

Services Marketing:

- Determine trends in services marketing
- Identify networks and cooperations BIE could join to attract business
- Evaluate additional services to be offered to the

company's B2B customers

- Determine appropriate channels for marketing to customers outside of the local area
- Identify the benefits BIE can communicate to potential customers
- Research extensions of the services provided
- Compare and assess BIE's product with other event planners

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Using the website to create a brand and brand expectations in the B2B target market
- Including references to past events, popular speakers, or well-received themes
- Establishing a "members only" area on the website that connects past participants
- Analyzing the benefits of various media, such as websites, podcasts, email, and so on
- Connecting with companies outside of the local area, and marketing the local knowledge of a special Indigenous environment
- Establishing ties with tourism attractions in the area that can be incorporated into the event planning
- Specialize in a certain type of event, such as team-building involving Indigenous concepts and culture
- Including outdoor activities into corporate events
- Creating a very unique and limited "give away" for BIE-branded events

Sample Instructions for Students

Considering the information given in this case study, your task is to apply marketing concepts to recommend a marketing strategy and approach for Be Inspired! The goal is to research options that are available to BIE, to explain suggestions and recommendations, and to justify your chosen marketing approach. Research into trends, B2B markets, and cultural developments should be integrated. The emphasis is on justifying your choices by utilizing your knowledge of marketing theories and concepts, as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 3,000 per year

Components: Marketing channels, marketing messages, timing/schedule, brand personality, target audience

The goal is to increase exposure and contracts for Be Inspired! while also growing the brand. Establishing a reputation for quality events, integrity, and authenticity is more important for the owner than quick growth. Your analysis should apply marketing and consumer behaviour concepts, keeping in mind the limited human resources currently available; if applicable, expenditures for additional staff have to be justified. Students should also focus on suggestions that create customer loyalty and form long-term relationships for Be Inspired!

All recommendations should be based on a detailed analysis of the target markets and services provided. Key performance metrics should be recommended and justified. Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors, research trends and local/national politics, and justify any service strategy modifications. Recommendations should integrate multiple marketing channels with a combination of

mass communications—such as advertising or promotions—as well as personal communications—such as direct marketing or word-of-mouth referrals.

40. Overview of the Business

Owner and Operator

Julie John owns and operates Be Inspired! Events and Event Planning. Julie is from the Little Shuswap Lake Indian Band, part of the Secwépemc Nation. Before starting her own business, Julie worked for the Secwépemc Health Caucus as an event planner and later went to school at TRU for event planning.

Watch Video Clip 1 – Rewards ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=309>

As an Indigenous business owner, her work benefits from her cultural knowledge and awareness, as well as the established connections through family, relatives, and her local First Nations community. She credits her work at the Secwépemc Health Caucus among her most valuable learning experiences.

Most of my learning was done during my job at the Secwépemc Health Caucus, when I actually got put into that position and role of an event planner, and I remember when I started that job [...], and at that time

I was thinking I'm not an event planner. I don't know how to plan events.



Figure 1 – Contributed. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

A coworker had seen her organize community events and had full confidence in her skills as an event planner. At the time, Julie was also doing regular fundraisers for her son's participation in hockey, making sure fees and travel expenses were paid for. Without really knowing it, she had developed event planning skills and felt more and more confident doing this as a job. Nevertheless, she calls it "a huge learning curve on that job," also realizing that networks and connections are critical.

Besides the work experience, her academic background influenced her to get the "business part" in order, to understand processes, and to learn how to run a business. It

taught her the confidence that she could start her own business organizing events.

The biggest education is just life experience, more than anything.

Her studies resulted in accomplishing the following:

- Events and Convention Management Diploma (TRU)
- Bachelor of Tourism Management, Major in Entrepreneurship, Minor in Marketing (TRU)
- Executive Master of Business Administration in Indigenous Business and Leadership (SFU)

History

Julie John came up with the idea and business plan for Be Inspired! while working on the Events and Convention Management Diploma at TRU. During her studies, BIE was still a side business, with a job here and there, providing extra income when needed. While studying for her Bachelor of Tourism Management, she actually operated a gift store, with the event planning still on the side. After finishing the EMBA at Simon Fraser University (SFU), the event planning business started to pick up; she got more and more contracts, and it turned into a full-time position.

She still stays in contact with other students from her studies, mostly with the Indigenous group at SFU. She calls on them to discuss ideas or share events, getting the word out. That degree also made the biggest difference in her learning, since the education was based on Indigenous experiences and with a context she can relate to. Currently, she uses that network at SFU more than the TRU network.

Going to school with students from across Canada,

and hearing about what they were doing and the levels they're at, [...] was so inspiring to me, to want to learn more, or to want to stay connected.

Julie's office is in Chase, BC, close to the lake and Quaaout Lodge. She has been operating this business since 2013. Before the COVID-19 pandemic, Julie hired a part-time employee who helped with the event planning workload, sometimes planning up to four events at the same time. During the COVID-19 pandemic, these events were cancelled, and the part-time employee had to be terminated. At the time of the interview in March, 2021, Julie started to pick up some contracts here and there as the light at the end of the COVID-19 tunnel was starting to be visible. Those contracts were mostly based on word-of-mouth referrals and came from organizations and companies she had worked with before.

The name for her business, Be Inspired!, originated from her previous job and her experience of invited speakers inspiring, uplifting, and empowering event participants. Julie appreciated that "inspired" feeling after a motivating talk, wanting to learn more and do better. Julie wanted to put on her own events that would be inspirational and rewarding.

41. Event Planning Services

Originally, Julie thought she would be organizing mostly her own events, inviting guest speakers and selling tickets. However, the contracts from other organizations started to roll in and increased through word-of-mouth referrals. This put her idea of creating her own events on the backburner; the plans still exist, but the contract business keeps her busy. In addition, she now provides mentoring work, offering sessions with individuals who would like to learn more about action planning.

As part of a contract for event planning, Julie takes care of all aspects of the event—such as accommodations, speakers, catering, marketing materials, and so on—providing peace of mind for her clients. She uses her network to invite people and groups, connecting the event to the local communities. She is flexible to include what the organizers require.

I have been requested to do weddings, and, I'm like, no way! I would not touch a wedding. So, my passion is more for the conferences, the meetings. I can do trade shows—anyevent—anything but a wedding.

She has worked on family retreats, staff retreats, large conferences, smaller meetings, grassroots events, and more. She has planned the Squilax Pow Wow as well as other pow wows and festivals. She has brought in comedy shows for the community and kids' magician shows. At her previous job at the Health Caucus, the events she planned were often limited to particular First Nation members, instead of being open to everyone, mostly because there were restrictions on the funds used for the event. That means that large events, such as talks

by Dr. Martin Brokenleg or Dr. Gabor Maté, were restricted to a particular audience, an aspect that Julie did not like. Her own events are all-inclusive, open to anybody who can benefit from them. Julie's events eventually included Dr. Maté, sessions for female entrepreneurs, and motivational speakers "who could uplift and inspire our people."

When companies organize their own events, they often run into staff or skill limitations. Hiring BIE means they do not have to worry or stress about it and can spend their time elsewhere. The fear is gone, and outsourcing it to BIE provides a huge relief. Julie reviews what these organizations want, considers the budget available, and determines how to fit it all into their financial plan.

Watch Video Clip 2 – No Stress ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Julie has organized events of all sizes. A 3-day outdoor Secwépemc gathering a few years ago, for example, attracted 600 people. With no running water and no infrastructure, participants camped on the empty land, and a lot of services were improvised. It was a challenge, but Julie succeeded in coordinating a big group of people to make it happen.



Figure 2 – Source: <https://www.juliejohn.ca/>. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

The subcontractors, such as caterers, are preferably Indigenous businesses as well, as Julie likes to support other Indigenous entrepreneurs. If difficulties arise, Julie is quick to think of solutions and will not let that threaten the event. Quick thinking and problem solving are critical, as are backup plans and constant movement and adjustment.

In addition to planning events, Julie has facilitated action planning sessions as well as debt planning with a few clients. She is helping these clients overcome their fear of even looking at their credit report and understanding how they can approach debt situations. This work led to one of her goals for the future, to facilitate workshops around money and to help Indigenous entrepreneurs with the financial side of their businesses while sharing her own story.

Watch Video Clip 3 – Workshops ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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After operating out of her current small office for a long time, Julie has plans to move into a storefront location in Chase, BC. The space is currently being renovated by family members, including bringing in Indigenous art work. Besides office space for her event planning business, this location will also host My Sisters Closet, a professional clothing assistance program, and a small Indigenous entrepreneur co-op space. Julie is creating an Indigenous Entrepreneur Hub where entrepreneurs can come in and do their research using the space and the computers.



Figure 3 – Source: <https://www.juliejohn.ca/>. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

While Chase has cafes and restaurants, there aren't really any suitable spaces for small business owners to hang out and use the WiFi to conduct their business; a gap that Julie plans to fill with her hub. There will also be a meeting/conference room that can be rented out or used by the entrepreneurs, and her logo will appear big and bold in the window!

I know with Indigenous people, they feel more comfortable if it's an Indigenous person they're talking to, especially around vulnerable ideas and thoughts. It's different than going to a non-

Indigenous person and sharing. So, having that cultural space, and to feel the culture when you walk in, that's one of my hopes, is that I can build a space where you walk in and you know it's an Indigenous business, an organization.

Julie is always attentive and open to further her learning as every contract and every event provide a learning opportunity.

Watch Video Clip 4 – Learning ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=313>

While her services are intangible, Julie tries to include items that event participants can take home. For example, she included sage pouches at a [TRU event that she planned and hosted](#). As with the suppliers she uses for the event planning, she also selects Indigenous gifts and authentic, meaningful keepsakes for her event items.

42. Cultural Components

Julie makes sure that her events are authentic and support Indigenous communities, being open and welcoming to all. She also includes important aspects of the Indigenous culture into her events. For example, there is always a prayer included at the beginning of an event. An elder, Chief, or Council member will provide a welcome. It is important to her to embrace and support the Secwépemc protocol into her Indigenous events where she focuses mostly on the Secwépemc heritage and traditions.

To see a recorded performance of Julie talking about being an Indigenous female entrepreneur, please watch [this video on Vimeo](#), uploaded by Raven Institute (2019).

43. Customers

The main customer base for BIE are organizations, specifically Indigenous organizations such as local bands. Examples include the Shuswap Nation Tribal Council (SNTC) or bands within the Secwépemc Lakes area. Sometimes non-Indigenous customers contact her, such as TRU or the Village of Chase, since they are looking for the connection to Indigenous communities and people. That is clearly Julie's strength and skillset.

These organizations typically do not have the staff available to put time and energy into planning an event, and when it is added to an employee's workload, it often does not receive the care and attention that it needs. BIE's customers range from local bands with 50 employees to universities such as TRU with hundreds of employees. Her reach is focused on Southern BC and, more specifically, the Interior of BC (e.g., Kamloops, Salmon Arm). Through networking and meeting people, out-of-area customers might contract her services, such as an organization in Vancouver planning an online event.

Julie notices that the Indigenous organizations that are her customers are looking to focus on connection, on family, and on learning. It is important to Julie and these customers that event participants feel welcomed and feel comfortable participating. The bridging of the gap between people of Indigenous and non-Indigenous backgrounds is dear to Julie's heart, and even the connection between bands.

The Village of Chase here, it's surrounded by three local bands. So, if our band has an event, no one from Chase non-Indigenous will go to the event or vice versa, and it's very separate. And even working with the local bands here, they have the same funding, but they're doing all three separate events because

they're divided by the funding. I always encourage them, "Why don't you connect with the other two bands and make a bigger event?" But because funding, there's some restrictions there.

Julie stated that BIE gets the most business from, what she calls, the "Moccasin Telegram," or word-of-mouth referrals between Indigenous people and companies. Sometimes people she worked with years ago, who have since moved on to other positions or organizations, will contact her about their next event. In addition, the organizations she plans the events for often promote her during that event, such as announcing on stage that the event was done by Julie John from Be Inspired! While Julie is still getting used to being publicly acknowledged, putting a face to the business and putting herself out there more will definitely help her business.

I am the worst at self promoting, but I'm learning to get better.

44. Competitors

Competing with other event planners is not something that causes Julie concerns. She states that her uniqueness is established by being an Indigenous owner and operator, and her connections to the Indigenous community and to the Nation solidify this distinction. Especially when the customers are non-Indigenous organizations, they value her insights, her experience, and her connections to her community.

It has happened that Indigenous community members offered event planning services on an individual level, especially when “expressions of interest” were published by larger organizations, but these individuals typically do not carry insurance and are not registered, and that is something the organizations require due to their policies and rules.

Because of her unique experience and skills, and her professional business setup, there are no direct competitors in her local area. A secondary level of competition might be organizations that have the funds and human resources to put on their own events; they are typically well-executed. Sometimes Julie notices details of these well-planned events that she would have liked to provide and organize, but she also sees this as a learning opportunity. It gives her ideas for new items or speakers to bring to her local area.

45. Pricing

Establishing prices for event planning services is an interesting exercise for the business owner. When Julie first started the business, she did not have the experience nor confidence to honestly value her services. Especially for Indigenous female entrepreneurs, a bad habit is often to offer services for free.

Oh, you don't have to pay me. I'll do it for free.

Without prior knowledge or a history of education with regards to money, determining prices was a scary necessity. There is always the fear that one charges too much, even though Julie mostly had the opposite experience where she named a price and customers readily agreed. She learned over time that she didn't charge enough. Valuing her time, her skills, and knowledge is still a challenge for her today, but she is getting better at it. This includes feeling confident about her academic background benefiting the business.

Through education, Julie developed a “formula” and created her price list from there. Even rate increases, such as a recent rise after the losses caused by the COVID-19 pandemic, are typically readily accepted by new and past customers. Promotions to claim being “affordable” or less than other event planners are not necessary or advisable for her business. Julie is still not 100% confident with the price discussions and sometimes fears potential customers would complain about the prices being too high, but “they are more than happy to pay what I’m asking,” and negotiations are not required.

It's just the stories that I make up in my own head!

Another benefit and reason that prices are readily accepted is the fact that her business is registered and insured, while

other providers and individuals in her area are not. That means that qualifications that are often laid out in “expressions of interest” sought by organizations can often only be fulfilled by her because of her insurance.

With regards to rebates or deviations from her regular rate, Julie has a particular approach.

Watch Video Clip 5 – Rates ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=321>

46. Marketing Approaches

Current and Past Marketing Activities



Figure 4 – Source: <https://www.juliejohn.ca/>. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

Word of Mouth

By far the most effective marketing for BIE is word-of-mouth referrals. Given the local area Julie is working in and the unique nature of her services and background, that is not surprising. Before the COVID-19 pandemic halted most events, BIE was maxed out in terms of customers that Julie could accept. Currently, at the back end of the pandemic, contracts are

starting to be offered to Julie again, and through word-of-mouth referrals, organizations she's worked with in the past are starting to get in touch. She reaches out to former customers regularly, and when they mention events "down the road," she makes sure to check in again and to follow up.

Social Media

To actively encourage new contracts, BIE uses social media, mostly Facebook and some posts on Instagram and LinkedIn. Other options, such as TikTok, at this point do not line up with BIE's typical customer base. Julie was fortunate to be trained in the design of posters and other marketing materials; a skill she treasures and uses often.

Watch Video Clip 6 – Designing ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=324>

She is thankful that this mentor in her previous job exposed her to creating marketing pieces, which showed her that she was passionate about this and instilled the confidence to create such work. For the most part, Julie designs brochures, posters, and other marketing materials for the events she plans herself. While that might not qualify as "professional" graphic design, it works for her customers and the community events she organizes, resulting in many positive comments.

BIE encourages word-of-mouth referrals and sharing of

details about the company that are communicated through social media or email. No incentives are needed for her content to be shared, but Julie has tried to hold contests to increase the interest. This could sound like, “Post and share, and win a gift card.”

Website

In the past, Julie has found that spending a lot of time to learn how to build a website, to research technology and so on, was not worth her time. So, she contracts a freelancer to help with the website design and appearance, ensuring her website is current and consistent, while Julie provides all the content.

I tried building a website, and it was so frustrating. Doing all the research, and all my time, and just at the end, feeling so frustrated and not wanting to touch it, even though I took a class on website development, but to learn it in class and then go on your own and do it, it's a whole different story. I really like the hands-on learning, not from a textbook.

The contracted marketing help BIE hired is the sole proprietor of a small business that was recommended to Julie through her network. She has been happy with the work done by this woman, which ensures that not only the website is well-designed but also that her social media presence is active and current. This is in contrast to Julie's attempt to do it all herself, similar to her trying to do all the accounting herself and now finally hiring a bookkeeper.

Watch Video Clip 7 – Social Media ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=324>

In the end, she admits, she should be doing what she is good at, what she is passionate about, and let other experts do what they do best. That avoids getting frustrated learning about other areas of business, such as the science and timing of marketing that goes beyond designing a poster, which she can do well.

For Facebook promotions, Julie would use free software to choose a template and create a social media post based on the content she wants to publish. Mostly, she uses pictures and converts them into compatible formats, though she admits that she is not familiar with the details and technology of advanced web content creation. Typical posts share information about her business or upcoming event details, and these are not targeted towards a specific audience but are instead open to all of BIE's followers. These posts also often get shared around the community and increase her exposure and word-of-mouth grassroots reach.

Paid Advertising

In addition, BIE has used paid ads on social media (e.g., Facebook) to promote events such as a fundraising golf tournament in the summer of 2021. These ads were targeted to reach the right audience. The statistics, such as how many people saw the ad, were tracked, which is something Julie does not do for her regular Facebook posts.

On Facebook, you see when most of the people are online—if it's in the morning or afternoon—and you can track how many people viewed your post and whatnot, but I don't usually go into that detail when I post, but that's something I should start tracking. There's a lot of work when you get into marketing online, and that's why you hire somebody.

Julie has done some radio spots for some of her other initiatives, but it is an expensive marketing tool. Overall, BIE sets a marketing budget that is communicated to the marketing person who is being used for the website and paid advertising. Often, that person suggests paid advertisement opportunities after doing the research, and Julie has agreed to lower cost options (e.g., a 5-day ad run for \$16). Anything that goes beyond the budget given will be discussed, and if the benefits and revenue potential are clear, it will be implemented.

Media Release

While she has not done any other paid advertising for BIE, she did use a media release for her Leading Indigenous Female Entrepreneurs project, known as the [L.I.F.E Foundation](#), as well as for [My Sisters Closet Clothing Program](#). Initially fearful about the unknown medium and response, she was thrilled to learn that some newspapers picked it up, and she even got interviewed by CBC.

That's another big learning curve that I have learned in businesses. Even through fear, and you're scared, just do it anyways, and that's the only way you're gonna learn [...], and if I allowed fear to stop me from putting out a media release, even though I didn't know how, I

would have never done that and gotten the attention that it deserves for that program.

Email

BIE also maintains a large email list, including past clients, registrants for past events, and potential customers like local organizations. The emails try to reach out to anybody who would be interested in a certain event. BIE actively uses this list to promote and stay in touch.

Newsletter

Another part of the L.I.F.E. project, the [Secwepemc L.I.F.E. Online Newsletter](#) is a free online newsletter run through the BIE website.

Personal Connections

Julie admits that she lacked confidence when she started building BIE. Reaching out and communicating with potential or actual customers did not come naturally back then, and she much preferred to work behind the scenes. She would attend networking events and be excited about the opportunity but also terrified at the same time. This contributed to the business being a side business and part-time job for a long time. Back then, she didn't have the skill to pick up the phone and call someone and talk about her business or set up a meeting. She has since learned that making personal connections is critical, whether it is face to face or by video calls online.

I always thought all these people are all smarter than me or I don't belong here, but doing my Master of Education and meeting all the other students when we first started that class, and everybody had that fear of "I don't think I belong here," but at the end, in going through our Masters, we became such good friends, and everybody has fears.

Marketing Challenges

One of the challenges for BIE is that there is no concrete plan for marketing each month. Something might come up, and a poster is needed; another month, the time required is much less. Julie appreciates the expertise and help of the marketing person she hired, but even that requires time on her part.

Watch Video Clip 8 – Time Needed for Marketing
([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousebusinessbc.pressbooks.tru.ca/?p=324>

Determining a budget and spending funds on marketing is a challenge for any small business. There are always other priorities, and expertise in deciding where the most benefit is gained from marketing expenditures is also in short supply. Julie is careful to operate within her means and not spend or promise money that may not be available.

With marketing for a solopreneur, a lot of people stay

away because radio is expensive, TV is expensive, and even putting an ad in the newspaper, or wherever, is expensive. Unless you are a bigger organization or a business who can afford that, for solopreneurs, you usually don't have dollars to put in a marketing plan. So, I'm fortunate the lady I'm working with works within my budget and does phenomenal work.

With business picking up again and BIE hoping to become as busy as before the COVID-19 pandemic, Julie is not opposed to spending more on marketing, especially if she can start organizing her own events. With a goal to sell out these events, she would most definitely increase the budget for paid advertising and marketing.

A consistent presence is important; Julie has seen too many gifted artists disappear because they can no longer afford a website or phone line. Being available and easy to contact is also part of marketing, and BIE makes sure customers do not have to fill out a web form and wait for days for an answer. She is always available over the phone and also responds to emails quickly, even just to say she will write more later.

Her marketing challenges are not influenced by her competitors, but instead they are influenced by her own personal experience in dealing with businesses. She knows what she likes and doesn't like, and she is not afraid to try something, then assess, and either continue or discard.

Marketing Opportunities

BIE often collects feedback from the event participants, even though ultimately that is up to the client to decide on. Sometimes, this is done via paper form, often promoting the chance to win a prize. It encourages participants to share their

thoughts before leaving the event. Online tools such as Survey Monkey have also been used, at the client's discretion. So far, BIE has not used the overall feedback from event participants for marketing but has collected testimonials from clients and participants who have sent personal messages to BIE.

From the website:

HEAR WHAT OTHERS HAVE TO SAY

Julie John of Be Inspired Events provided excellent support to us in organizing the 2019 BC Studies Conference at Thompson Rivers University. We were very grateful for her help in designing the program and the promotional material, and appreciated her professionalism and her attention to detail in arranging various conference events. She helped to make the conference special in many ways, including by personally preparing over 100 sage pouches as gifts for attendees. We would definitely recommend Julie to others who are in need of event planning and assistance – you won't be disappointed!

— TINA BLOCK (Associate Professor, History) &
BRENDA SMITH (Open Education Librarian) CO-
CHAIRS, 2019 BC STUDIES CONFERENCE

The feedback forms for the clients include any questions that the client wants to ask the participants. BIE's own feedback forms focus on whether participants enjoyed the event, what suggestions they have, and how BIE's services can become better.

Through social media and people just commenting and stuff, I get feedback that way, but nothing targeted where I put anything out on social media asking for feedback.

Julie John is part of the BC Native Women's Association and quite a few other groups that support Indigenous female entrepreneurs on the provincial and national level. In addition, she joined the Chase Chamber of Commerce and is still on the email list for the Kamloops Chamber of Commerce, though no longer a member. She is working with the Chase Chamber of Commerce, trying to include more Indigenous businesses in their directory and also to clarify the benefits of joining the chamber. Discussions are also starting with the Little Shuswap Lake Indian Band to share profiles of band members' entrepreneurial business ventures on their website, with links and a dedicated space online. This will assist in promoting the businesses for free.

There are other organizations that are suitable for small businesses to become members. At conferences and meetings, opportunities for joining these are often presented. It was an eye opener for Julie to learn that small business is often defined as 50+ employees, which is a far cry from her "solopreneur" operation. Accordingly, fees for these organizations are often way too high for a solopreneur.

As an example, the BC Indigenous Business and Investment Council offers memberships and certifies a business as an Indigenous business, which includes many benefits, but the fee is about \$300 per year. An expense such as this is not a priority for BIE, especially since BIE's work is so local, even though the networking opportunities would be beneficial. Workshops and events provided by the council can be joined as a non-member as well, which BIE has done.

I really love attending workshops and events—anything to do with Indigenous

entrepreneurship—andmeeting people that way, networking that way, and being at an event that I truly want to be at and that inspires me. I think I would rather spend my money on that than a membership.

Being creative with the marketing approach, even if the business doesn't have a large budget, is key for entrepreneurs. Thinking outside of the box and spending the money that is available most effectively is critical. BIE isn't afraid to get creative, use marketing that doesn't cost money, ask for deals, use its networks, and include its own resources.

Another dream and future opportunity to promote BIE lies in facilitating BIE's own workshops. Specially, Julie has read and learned a lot about a healthy relationship with money, which she would like to pass on to others. Her upbringing and habits acquired from her environment favoured spending and not making money, so developing this healthy approach to making and saving money has been a steep learning curve that Julie would like to include in her own workshops.

Watch Video Clip 9 – Money ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=324>

Julie also recently finished a film making class on how to make a documentary. With this addition to her skillset, she would like to video interview Indigenous female entrepreneurs, professionally edit and publish that film, and create a resource and a following. She also loves listening to podcasts and would like to create a podcast channel that interviews Indigenous

female entrepreneurs who share their challenges, successes, and stories about their businesses.

BIE has not focused on reviewing and comparing statistics and metrics on a regular basis, such as views and shares within social media. If something gets a lot of traffic and shares, Julie might notice but does not use that information further.

An advocate for dreaming big, Julie would love to invite well-known motivational speakers and get to that level of event planning. Hosting an event that is attended by thousands of people, bringing in guests such as Buffy Sainte-Marie, or bringing an international speaker to her area—these are dreams that could become reality in the future. With an increase in contracts, and if the budget allows, Julie would also hire an assistant to help her with the smaller tasks so that she can stay focused on the bigger picture.

47. Resources and Credits

Resources

Information included in this case study was collected during a personal interview with Be Inspired! Events and Event Planning's owner, Julie John. All quotes listed in this case study are from the video interview with Julie.

John, J. (2021, March 10). Personal interview.

References

Raven Institute. (2019, June 20). *Julie John* [Video]. Vimeo. <https://vimeo.com/343382881>

Credits

Julie John, MBA, Owner, Be Inspired! Events and Event Planning

Biggi Weischedel, PhD, Open Learning Faculty Member

Marie Bartlett, MA, Instructional Designer, Learning Design and Innovations

Justin Frudd, MA, Editor, Curriculum Services

Nicole Singular, BEd, Graphic Designer, Curriculum Development

Jonathon Fulton, BFA, Video Producer, Learning Technology and Innovations Group

Stephanie Gountas, BCS, Curriculum Multimedia Developer

PART VI

SPIRIT OF THE LAKE NATIVE BOUTIQUE CASE STUDY

48. Introduction

The Spirit of the Lake Native Boutique (SOTL) case study explores marketing issues and challenges experienced by a gift store in West Kelowna, BC. Not only does it include discussions of the store's target market, experiences, and appropriate as well as affordable marketing channels, it also addresses challenges of Indigenous business ownership and has an Indigenous product emphasis.

Exploring and showcasing Indigenous local culture has been a focus for Thompson Rivers University (TRU) for years now. Accordingly, we strive to include Indigenous content into our business courses, which this case study supports by exploring issues experienced by Indigenous businesses. As a significant and important niche business in British Columbia and in Canada, Indigenous business ownership is growing and flourishing. The following case outlines the current situation for SOTL, setting the scene for students to assess marketing opportunities, justify marketing recommendations, and rationalize strategic marketing approaches.

49. Teachers Resource

Course Fit

By analyzing the information presented in this case, students are able to conduct research into topics such as Indigenous businesses, unique marketing challenges faced, approaches to create brand identities, product selection, pricing, marketing affiliates as well as marketing opportunities, and relationship building. Students will suggest marketing strategies that can overcome challenges from the past and keep SOTL successful. By analyzing this case, students will be exposed to the following marketing topics:

- Marketing Strategy
- Marketing Research
- Competitive Advantage
- Location Challenges
- Brand Identity
- Product, Price, Place, and Promotion
- Indigenous Business
- Strategic Alliances
- Affiliate Marketing
- Destination Marketing
- Retailing
- Positioning
- Consumer Behaviour
- Decision-Making Processes
- Marketing Communications

Analysis approaches based on the information provided in this case fit any advanced marketing course, whether graduate or undergraduate, assuming students have had exposure to basic

marketing courses as well as specific marketing topics such as marketing strategy, marketing research, retailing, and consumer behaviour.

Suggestions for Use

The information in this case is suitable for specific assignment questions in multiple marketing areas. Instructors using this case may provide students with their own questions, based on the topic of their courses and the content they have covered. Below are some suggestions on the topics that can be covered through an analysis of this case.

Consumer Behaviour:

- Apply decision-making concepts and steps to a typical purchase at SOTL
- Apply attitude models to this situation and target audience
- Apply concepts of cultural values and reference groups to this case
- Identify suitable subcultures to be targeted
- Identify cultural influences on the behaviour of SOTL's customers

E-Commerce:

- Investigate the benefits of spending time and money to start e-commerce operations
- Research the objectives and components of an improved website

- Research opportunities to tie into other e-commerce operations based on target market
- Assess how e-commerce operations would fit with the Indigenous focus of the store
- Identify competitors in a potential e-commerce setting

Advertising:

- Determine appropriate information to be included on highway signage
- Identify suitable print publications for advertising
- Evaluate research on the effectiveness of radio advertising for local businesses
- Design an advertising plan and budget for social media ads (e.g., Facebook, Google)
- Investigate additional directories that could be beneficial for SOTL

Tourism Marketing:

- Suggest ways to attract and reach visitors to the area
- Identify networks SOTL could enter to promote the store to tourists
- Determine appropriate channels for marketing to potential out-of-town customers
- Research inventory expansions with an Indigenous focus that attract tourists
- Compare SOTL's offerings with other attractions for tourists in the Okanagan
- Investigate current trends in tourism marketing

Teaching Notes

Below, please find some select marketing ideas that students can be prompted to identify and research, especially if the case is used in a classroom setting:

- Using the website to sell higher priced items, providing customers the opportunity to research before a visit
- Including references to popular products in ads, commercials, or other materials
- Working with tour companies, such as wine tours, cruises, or rail tours
- Connecting with the local ski area to offer tours to the store during the winter months
- Establishing ties with other tourism attractions in the area
- Working with other stores within the Westbank First Nation (e.g., museum, cafes, etc.)
- Participating in the Kelowna Farmers' Market after expanding the food selection
- Offering custom products by working closely with local artists

Sample Instructions for Students

Using the information in this case study as a basis, your task is to apply marketing concepts to recommend a marketing strategy and approach for Spirit of the Lake Native Boutique. Please note that the goal is not to find out what was actually done but to research options, explain your decisions, and elaborate on your chosen marketing approach. The emphasis is on justifying your choices by utilizing your knowledge of marketing theories and concepts, as well as supporting your choices with academic sources.

Time frame: 2 years

Budget: CA\$ 5,000 per year

Components: Marketing channels, messages, timing/schedule, brand personality, target audience

The goal is to increase sales, exposure, and brand recognition for SOTL by applying marketing concepts in various areas (e.g., consumer behaviour), keeping in mind the limited human resources available. Students should also focus on suggestions that create brand loyalty and form long-term relationships for SOTL with customers and suppliers.

All recommendations should be based on a detailed analysis of the target audience, including creating a persona. Key performance metrics should be recommended and justified. Benefits and challenges for any suggestions and recommendations need to be clearly stated. Students are expected to research marketing concepts, assess brand positioning, analyze competitors and supply options, and justify any product strategy modifications. Recommendations should integrate multiple marketing channels with a combination of mass communications—such as advertising, promotions, or events—as well as personal communications—such as direct marketing or word-of-mouth referrals.

50. Overview of the Business

History and Location

Tasha Mae Swite, the owner of SOTL, had the idea of starting her own business in 2017 while being employed locally in her hometown of West Kelowna.

I've always wanted to be an entrepreneur or own some kind of business, but I just didn't have or lacked the confidence to move forward into that.

She noticed that a local gallery—Turtle Island Native Gallery in downtown Kelowna—offered high-end art pieces but dealt with challenges such as parking and location. In this gallery, the prices ranged from \$50 to \$4,000 for carvings and other special items. After a robbery, they closed the store. Since then, there was a distinct demand for a gift store with authentic Native art, with only a limited selection offered at a local Native gas station.



Francis and Charlie

Picture taken in Kelowna, Leon Ave. known as China town at the time. 1938-40. They sold firewood here each winter. There was a Chinese family that would invite the Swite family to their restaurant every New Years Day for a free meal to show their appreciation.

Figure 1 – Contributed. This image may be subject to copyright and doesn't fall under the CC licensing of this OER

Tasha envisioned a store that provides higher-end gifts that are still affordable, creating a place that combines culture and

support of Indigenous artists locally and nationwide. In opening her own store, Tasha, of Syilx-Okanagan and Assiniboiné-Sioux heritage, is a fourth generation entrepreneur and the first female entrepreneur in the Swite family; her kids, already helping in her store, represent the fifth generation of entrepreneurs in the family. By including her children and bringing them to work, she is already instilling the vision in them that they can be whoever they want to be, that they can get involved in anything they want. Looking back into her family history, her grandfather and his brother operated a firewood business, cutting wood on the west side of the lake and hauling it via ferry to Chinatown in Kelowna, while her great-grandfather raised cattle and horses.

The current storefront used to be a fruit stand, which was going to be demolished. When she indicated to her father, who owns the property, that she was interested in using the space for her new business, he assisted her in applying for a grant which she received from [ANTCO](#) in the form of a [First Citizen's Fund and through the New Relationship Trust](#). Based on her age, she still qualified as youth, and after a difficult wait of many months, she was awarded grant money to start her business.

You gotta hustle to make your business work.

Ultimately, it was September of 2019 when Tasha got the “green light” to proceed towards her dream of entrepreneurship, and after giving notice to her employer at the time, she dove into her new role head-first. Having a good support system helped Tasha, who is also a wife and mother, and the store opened in November of 2019, just in time for the Christmas rush.

My vision was [...] start small and grow from there.



Figure 2 – Contributed. This image may be subject to copyright and doesn't fall under the CC licensing of this OER

Not expecting the repercussions and restrictions of the COVID-19 pandemic, the business had a difficult start but managed to stay open through 2020. Given their products and location, it was a “grey zone” with regards to COVID rules. Their success continued through 2020, and the store did not even reduce business hours, instead adjusting processes to electronic transfers, local deliveries, and so on. Currently, the store is open 9am to 4pm from Tuesday to Friday, and 10am to 4pm on Saturday.

The name of the store—Spirit of the Lake Native

Boutique—honours Ogopogo, which is *n̓xaʔx̓ʔitkʷ* in *nsyilxcən*, the spirit in Lake Okanagan. Discouraging the spirit’s depiction as a cartoon character or monster, Tasha tries to bring back the name to its original meaning, being about the land and the water.

The logo she selected shows the Ogopogo pictograph in the centre, resembling an orange sun, with the water below. The Aztec triangle design in the back represents Tasha’s Assiniboine heritage.

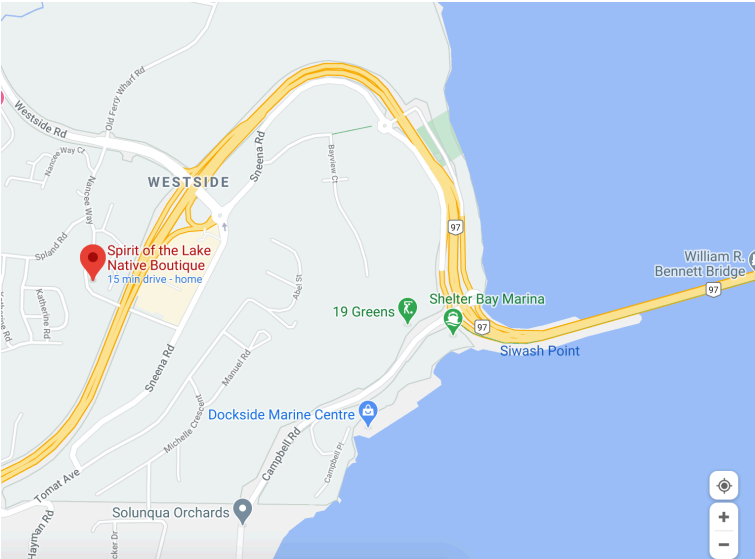


Figure 3 – Logo. Contributed. This image may be subject to copyright and doesn’t fall under the CC licensing of this OER

Tasha’s store is located at 1960A Nancee Way in West Kelowna. It takes about 7 minutes to drive from downtown Kelowna. Located in a residential area that is not easily accessible from the highway, with the shopping centre on the other side of the highway, the building is also used by Tasha’s father as office space for his businesses.

While not visible enough for foot traffic or spontaneous visits, Tasha enjoys the location, and customers have commented positively on it as well. Tasha mentioned that in the future, a

more visible location closer to Westside road could increase traffic. Depending on the future development in her area, a move towards downtown West Kelowna could also be considered. However, being in the area where her great-great grandfather started his entrepreneurial life by looking after horses that were left by people taking the ferry to Kelowna, has a special meaning for her and the store.



Source: Google Maps

Employees

Tasha is the sole proprietor of SOTL, which is a 100% Indigenous-owned store. Initially, she planned on running the store on her own, made possible by having help with her family commitments. The woman she originally hired to provide beadwork became an employee after offering to help out and getting the business going. Now, Janie has been working there

since the doors first opened and takes care of all the front-end operations, while Tasha manages the back-end.

In addition to Janie, Tasha hired two other employees. One started in March 2020, immediately before COVID became a concern, and Tasha felt strongly about giving her an opportunity and helping her get on her feet to gain some experience and confidence. In December 2020, because of uncertainty related to COVID, Tasha had to let this employee go but hopes to invite her back when sales pick up. Another employee was hired for a short time in December 2020 for social media work (see Marketing Approaches).

I almost see myself in her: timid, shy [...], lack of confidence. That's who I was back 10 years ago, where I [...] didn't want to talk, but I was willing to work and help.

51. Product Details

The product assortment includes jewelry, beadwork (e.g., on key chains), pottery, blankets, moccasins, scarves, and other clothing. SOTL features local artists, such as elders from West Kelowna, and sources beadwork, ribbon skirts, and Native design pillows from those artists. According to Tasha, these items “flew out the door,” especially when the local First Nations museum was closed and couldn’t show these art pieces anymore during 2020. Another example of a local artist from Kamloops that SOTL is featuring is Louise Alphonse; she crafts drumsticks, drum bags, and moccasins.



Figure 4 – Products at the store (CC BY-NC-ND 4.0)



Figure 5 – Products at the store (CC BY-NC-ND 4.0)

Tasha wanted to carry the Pendleton brand, offering blankets, baby blankets, towels, and so on. Ordering issues due to the pandemic meant that the inventory was greatly reduced, but what did come in sold very quickly. In the future, and when that brand's production resumes, a steady and organized supply of Pendleton products is anticipated.



Figure 6 – Products at the store (CC BY-NC-ND 4.0)

SOTL would like to carry Manitoba Mukluks, which are in high demand; so far, competitive restrictions prohibit Tasha selling the line. SOTL does stock moccasins from a vendor in Fort Nelson as well as the Oscardo brand and sterling silver from Vancouver Island by Reg Gladstone. Nu Trendz is another brand that Tasha has in stock. Based out of Edmonton, Nu Trendz sells Native-themed items; however, Tasha has plans to discontinue this line. She also sells Okanagan Select salmon products, both canned salmon and jerky, which have been popular as gifts and luxury food items.

My first round of salmon didn't go very well, but that was due to COVID. But this Christmas round, I had 48 cans. They're all gone. We just did a reorder of [...] salmon jerky and canned salmon, the traditional with the bone in and the bone out.

In the beginning, Tasha would do a lot of research, finding providers of Native arts and gifts by calling or emailing them directly. There was a learning curve in finding out what works for her unique supply chain.

Watch Video Clip 1 – Reg Gladstone ([Transcript Available](#))
(CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=343>



Figure 7 – Products at the store (CC BY-NC-ND 4.0)

Local vendors would stop at the store and offer their products for SOTL to purchase and sell, such as pine needle baskets, a baby bassinet, and so forth. Even if a sale wasn't guaranteed, Tasha considered these items to promote local culture and to

serve as a “conversation starter.” Even though some products offered at SOTL are made internationally, Tasha focuses on showcasing local Indigenous artists as much as she can. Well known local names and artists are featured and will continue to be a focal point for the store.

The SOTL store faces the issue that many of the more typical items and brands are available at Native gas stations. The plan is to get away from these “standard” products and be different, be distinct. So far, the store hasn’t been able to offer high-end pieces, but Tasha plans to start selling higher-end items in the future, once the uncertainty of business operations during COVID times has eased.

A trend that Tasha noticed is the demand for homemade items, such as moccasins or wood carvings. She also commented that often, by default and with no shortage of artists within the Okanagan Nation, she becomes the liaison, linking artists to customers looking for a special custom piece (e.g., drum work, teepees, beadwork, jewelry, etc.).

Watch Video Clip 2 – Custom Orders ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=343>

Considering the products and SOTL’s location, the owner is planning to host another outdoor market in the parking lot, inviting other vendors and showcasing artwork from First Nations or non-First Nations artists. The first attempt of this happened in April 2020, when COVID restrictions were vague, and it was a success. For instance, an artist creating bird houses

found exposure and customers. Tasha has a connection to a local Westbank First Nation (WFN) member who is also planning on starting a group to organize outdoor markets with vendors, artists, and possibly a food truck.

Overall, SOTL provides a great platform for local artists, and Tasha would like to expand her line of BC and Alberta Native art to covering Canadian Indigenous art from across the nation.

Watch Video Clip 3 – Expansion ([Transcript Available](#)) (CC BY-NC-ND 4.0):



A video element has been excluded from this version of the text. You can watch it online here:

<https://indigenousbusinessbc.pressbooks.tru.ca/?p=343>



Figure 8 – Products at the store (CC BY-NC-ND 4.0)

All employees also make sure to welcome customers to the store and make them feel comfortable, showing that they care. They let them smell their smudging ingredients, which always provides a conversation piece.

Tasha is open to sharing her heritage and culture with her customers. The only exception she makes is for her own beadwork and medicine. In the traditional Native community, medicine is not sold for profit. So, when she did agree to stock some sage and sweetgrass due to requests, she was open to a trading arrangement with a local elder instead of selling the medicine.

52. Competitors

Identifying competitors is somewhat difficult, given the unique selection offered at SOTL. Tasha noted that a few other Indigenous businesses or customers to choose from are within 1000m of her store, that being Owl's Nest Smoke and Gift Shop, the Indigenous World Winery, and the [Sncəwips Heritage Museum](#). There is also the Canco gas station along the highway to downtown West Kelowna.

I go there regularly, so I know what they're selling. We've had conversations of what my vision is to a point. I don't tell them too much.



Figure 9 – Products at the store (CC BY-NC-ND 4.0)

Tasha visits these stores regularly to make sure that her

offerings of the “standard” items are different from what customers can find elsewhere in the West Kelowna area. In particular, multiple locations carry items from the Oscardo line, and Tasha prefers to carry unique items that cannot be found elsewhere in town.

Watch Video Clip 4 – Competitors ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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<https://indigenousbusinessbc.pressbooks.tru.ca/?p=346>

Further north in the Okanagan, the Neehoot Grocery at Newport Beach is part of the Vernon Okanagan Indian Band and sells Pendleton, Manitoba Mukluks, and other brands. They offer blankets, mugs, Native Northwest items, and “a little selection of everything” in addition to being a convenience and tobacco store.

Going south down the Okanagan Valley, the Penticton Indian Band sells much of the same in their Silver Grizzly store, including Pendleton, Manitoba Mukluks, tobacco, and so forth. Throughout the valley, there are other souvenir shops, but SOTL does not consider them competitors, with each having a unique focus and brand. Even the name “Spirit of the Lake” encourages customers to visit.

Even my name of my business brings people: Spirit of the Lake. They want to know, you know, more of that.

53. Pricing

The prices at SOTL are competitive, influenced by Tasha's regular visits to other stores. She even offers to price-match if a customer sees the same item elsewhere for less. Feedback has been positive, and customers haven't commented on the store being too expensive, instead appreciating the authentic origins. In her experience, price is especially not a focus for higher-end items where customers are happy to find a unique gift and do not question the price.



Figure 10 – Products at the store (CC BY-NC-ND 4.0)

Tasha prefers not to negotiate the prices she pays to artists, instead accepting what they deem appropriate for their work and supporting them. She only adds a minor margin to the art work, staying close to the price that the artists set for their

work. Taking art on consignment has been a consideration, but insurance concerns have prevented it so far (e.g., who would be responsible for damage to the item while at the store?).

The store does offer discounts and specials, promoted through Facebook and on the website. In addition, Tasha sometimes includes discounts on her receipts for returning customers (e.g., 10–15% off the next purchase). Sometimes a draw for a mug or blanket can entice customers to return to the store as well.

54. Customers

By the store owner's estimate, the typical customers are 30 to 55 years of age. They are working adults living around Kelowna and the wider Okanagan, some are retired, and they love the First Nations culture. They are looking for unique gifts or indoor/outdoor home decorations. In particular, the customer group of 55+ is looking for special Native art pieces, made locally and with a "story." Customers looking for higher-end art pieces can hopefully be accommodated in the near future (see Pricing).

Members of other First Nations also come to West Kelowna to shop as it is central and has many shops for tax exemption shopping. They come from Kamloops, Merritt, and the surrounding area to stop by SOTL on their shopping trips. In addition, the 2020 pow wow season did not happen, and SOTL carries some of the items you would find at a typical pow wow.



Figure 11 – Gift bags for TRU event (CC BY-NC-ND 4.0)

Many of the First Nations organizations in the area have made a point of supporting the store during the COVID-19 pandemic by buying gift cards or raffle prizes in the store (e.g., Okanagan Nation Alliance, Westbank First Nation, Penticton Indian Band, Vernon, Okanagan Indian Band).

55. Finances

As discussed earlier (see Overview of the Business), grants have helped the setup of the store. The marketing budget is currently based on sales, with the hopes that a strong first half of 2021 will improve the bottom line and leave more money for marketing activities. During the fall of 2020, with slow sales, the expenditures had to be reduced.



Figure 12 – Products at the store (CC BY-NC-ND 4.0)

56. Marketing Approaches

Current and Past Marketing Activities

Social Media

Marketing activities are focused on a social media presence on Facebook and Instagram, which are the platforms that Tasha is used to and knows how to manage. SOTL's Facebook page currently has 2100 followers. A new hire in December 2020 was made with the goal to let her handle the social media activities; this was very successful, but the employee moved on for personal reasons in January 2021 and is now employed on an on-call basis, mainly for social media work.

Tasha uses Google reviews and Facebook reviews to get feedback from the customers. She also encourages followers on Facebook and Instagram to like, share, or comment on her posts.

Watch Video Clip 5 – Communication ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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SOTL has not purchased Google ads but has uploaded pictures to the Google listing. It has worked well for people searching for Native art.

Email

SOTL collects emails from every customer and uses them for occasional email campaigns, like for New Year's or Aboriginal Appreciation Day/Month. As an example, an email "blast" might offer small discounts for returning customers (e.g., spend \$100, and get 10% off) or a prize draw for customers as an incentive to return.

Word of Mouth

Given the positive feedback received from customers, word-of-mouth referrals are an effective marketing tool to spread the word about the store.

Watch Video Clip 6 – Word of Mouth ([Transcript Available](#))
(CC BY-NC-ND 4.0):



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Print

Flyers have also been used in the past. They were small cards with the store's logo on one side and the location and store hours on the back. They were handed out at events or while shopping instead of business cards.

The store considered using newspaper ads in January but decided that they “don’t really see people reading the newspaper very much.”

Billboards

When the store opened in 2019, Tasha made a connection with a local billboard advertising group that provided her, as a First Nations entrepreneurial business, free advertising on billboards in West Kelowna and Winfield. The actual effect of those billboards on sales is hard to measure.

Website

SOTL has a [website](#) that Tasha plans to convert into an e-commerce website.

TV



Figure 13 – Contributed. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

When SOTL was approved in 2020 for a COVID Stimulus Grant program by Indigenous Tourism Association of Canada (ITAC), Tasha reached out to the local TV station—Global Okanagan—to do a commercial for the Christmas season. At a reasonable price of around \$3,000, the team from the TV station visited the store in October and created the ad, and the staff had fun getting “dolled up” for the shoot!

With an exposure of 1.2 million people from Revelstoke to

Oliver, this commercial had a wide reach and aired eight times a day while it ran. It brought a lot of customers into the store, triggering sales of at least \$1,500 per day. This channel seemed suitable to reach the typical customer, and it specifically increased demand for moccasins; the store's stock of 30 pairs sold in two weeks after the commercial aired, and there is still a waitlist of 50 customers interested in buying from the next delivery.

Watch Video Clip 7 – Commercial ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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Community

SOTL is part of the Indigenous Tourism Association of Canada (ITAC) and the Thompson Okanagan Tourism Association (TOTA). The West Kelowna Chamber of Commerce offered membership, but it was unclear whether there was value in it for the store. However, the mayor and representatives of the Westbank First Nation (WFN), as well as BC's Lieutenant Governor Janet Austin, visited the store after it opened and acknowledged Tasha's enterprise.



Figure 14 – Contributed. This image may be subject to copyright and doesn't fall under the CC licensing of this OER.

Watch Video Clip 8 – Exposure ([Transcript Available](#)) (CC BY-NC-ND 4.0):



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The store also sponsored a senior's slow-pitch softball team in 2020, with the store's name and logo appearing on the team's apparel. In addition, SOTL sponsors the West Kelowna Warriors ice hockey team by purchasing a board sign in the arena.

It was actually quite a good deal, so they're going to create my sign, put it up this month, and it's going to run for this season and next season of hockey. So, I get almost 13, 14 months of hockey. I'm a hockey mom, so I miss going to the rink.

The store also marketed their products at events in the Okanagan, such as an outdoor market in Kamloops where

Tasha attended for two Sundays. It helped spread the word about her store and location.



Figure 15 – Products in the store (CC BY-NC-ND 4.0)

Reaching out as a female Indigenous entrepreneur connected Tasha to knowledgeable coaches, such as the owner of the Kekuli Café and the Pattison group. Even before opening, Tasha attended workshops with presentations on Indigenous Women in Business and started networking with mentors and potential partners. The WFN also did a promotional video about her store and hosted it on their YouTube channel. Her dad has supported and encouraged her along the way, while other elders in her community mentored and supported her by distributing marketing materials and allowing her to use the name “Spirit of the Lake.”

Challenges

Marketing challenges include the location that is not visible from any major roads. Tasha also states that she lacks the technological knowledge and skills of marketing offline and online, which is one of the reasons she hasn't done any online advertising. She hopes that her newest employee will teach her how to use technology better for marketing as well as starting e-commerce capabilities on her website.

Marketing Opportunities

As for most small and/or new enterprises, budget restrictions and uncertainty over the return on investment in advertising and marketing cause hesitation to spend money in this area. However, consistent feedback indicates that many potential customers, with an interest in Indigenous gifts and arts, do not even know the store exists, so “putting it on the map” is essential for its future and growth.

Even though the tourism business is at this point a secondary market for SOTL, working with tour companies would open a large customer base. Early on in its existence, SOTL hosted a bus tour of participants from the Cannabis Conference when it happened in Kelowna. Okanagan Wine Tours is located next to the store, and preliminary discussions have occurred about putting the SOTL logo on their vans and making the store a stop on the wine tour.

A business that was interviewed for another one of TRU's Case Studies on Indigenous Business, Moccasin Trails, expressed interest in working with SOTL to include the store in their tours. SOTL was a tour stop when the WFN brought participants of a land developer workshop to the store.

One girl was from PEI, and she bought a scarf. She ended up phoning me back, and she said, “Can you mail me one again? My mom really liked my scarf, and I should have bought two.” So, I ended up mailing it to her, and I was like, “Oh. You’re my first mail sale.”



Figure 16 – Products in the store (CC BY-NC-ND 4.0)

SOTL is close to other attractions, not far off Highway 97, and has a large parking area that is suitable for buses and RVs. The store is wheelchair accessible, and modifications to the outside area could make it even more appropriate for stop overs and tourists.

Tasha has considered creating a brochure but hesitated due to the costs involved, both in terms of hiring help to create it and to publish/distribute it. The effectiveness would have to be established before such expenses are authorized. The local tourism association offered a listing on the foldable tourist map

for about \$450, but it is unclear whether the demographic that uses paper maps over online information would be suitable for the store.

Early on, Tasha did prepare a letter announcing her store and sent it to wineries in West Kelowna. She was offered space to place brochures but wants to avoid using a lot of paper for environmental reasons.

Online ads and a repeat of the TV commercial have been considered. Expanding the involvement in industry organizations could also be beneficial and could include the Kelowna Chamber of Commerce. Other ideas that Tasha had are events to meet the artist, showcasing local artists (e.g., wood carvers, metalsmiths, etc.) and facilitating connections with customers.

Joining outdoor markets in Kelowna, as long as the rules and regulations about the origin of products sold allows, is another option. The Downtown Association of Kelowna could be approached to host a table at one of their outdoor events.

**Just maybe going across the bridge a little bit more
and, you know, showcasing who I am, who my store is,
my brand.**

In addition to these opportunities, workshops for drum or rattle making, or potentially moccasin making, could also be offered as an experience at the store.

Tasha has grown confident through the experience of opening her own business. She is a role model for other female, Indigenous entrepreneurs locally and nationally. Having the support of her family and community is essential, and Tasha is committed and true to her Indigenous heritage and the authentic focus of her boutique.

**If I look at myself now, and I look at myself today [...]
Wow, like at the growth, and the confidence is there.**

Watch Video Clip 9 – Transformation ([Transcript Available](#))
(CC BY-NC-ND 4.0):



*A video element has been excluded from this
version of the text. You can watch it online here:*

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57. Resources and Credits

Resources

Information included in this case study was collected via email and during a personal interview with Spirit of the Lake Native Boutique's owner, Tasha Mae Swite. All quotations listed in this case study are from the video interview with Tasha Mae Swite on February 4, 2021.

Credits

Tasha Mae Swite, Owner, Spirit of the Lake Native Boutique

Biggi Weischedel, PhD, Open Learning Faculty Member

Marie Bartlett, MA, Instructional Designer, Learning Design and Innovations

Justin Frudd, MA, Editor, Curriculum Services

Nicole Singular, BEd, Graphic Designer, Curriculum Development

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Stephanie Gountas, BCS, Curriculum Multimedia Developer